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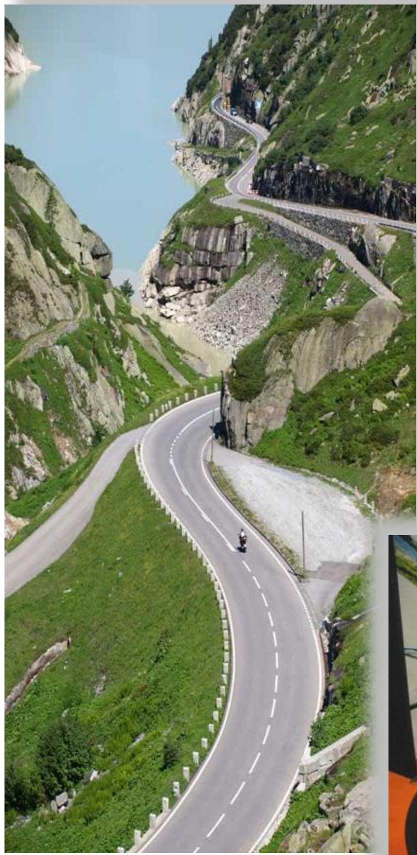
Motorcycles

European Market Briefs

2011 - 2012



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This compilation of market briefs, a U.S. Commercial Service Milan initiative, is a production of the U.S. Commercial Service's Showcase Europe Automotive Team*. Our objective is to provide American exporters a quick overview of the many European market opportunities and a handy resource guide of contact information. Please let us know how the U.S. Commercial Service in Europe might help you!*

Cover photos, Grimsel Pass (Switzerland) and Stelvio Pass (Italy), courtesy of CIMT (Central Italy Motorcycle Tours), Rome, Italy, http://www.cimt.it/

Booklet printed by Poggi Tipolito S.r.l., Assago, MI (Italy), http://www.poggitipolito.it/

COUNTRY MARKET BRIEFS

(*) EU Safety and Type-Approval Information

AUSTRIA

Capital:	Vienna
Population:	8.4 million
GDP:	$376 billion
Currency:	Euro (EUR)
Language:	German

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SUMMARY

Austria is a dynamic EU member country with an affluent population of 8.4 million, predominantly German speakers. Austria's manageable size and stable business environment make it an attractive market for U.S. exporters, as well as an attractive test market for U.S. firms with an eye toward expansion into neighboring Germany. Austria's historical and economic ties to the growth markets of Eastern and Southeastern Europe also make it a logical base for serving those markets. At present, approximately 330 U.S. firms have subsidiaries, affiliates, franchisees and licensees in Austria, of which about 150 have regional responsibilities for Central European, Eastern European or Balkan countries. U.S. products and services enjoy a good reputation in Austria.

In 2010, there were 696,714 motorcycles registered in Austria. The Austrian motorcycle market is dominated by European and Japanese manufacturers: Yamaha, Piaggio, KTM, and BMW being perfect examples. Most motorcycles sold and registered are either 50cc or between 50cc and 125cc; the demand for mopeds and scooters as commuter and city transportation is greater than that for leisure and sport bikes, segments which typically consist of motorbikes greater than 125cc. Within the latter two segments, though, one American company (Harley-Davidson) has consistently performed well within Austria, ranking 7th in the over 125cc segment and 8th in the over 50cc segment in 2010 (domestic producer KTM and nearby German BMW ranked 1st and 2nd, respectively).

MARKET ENTRY

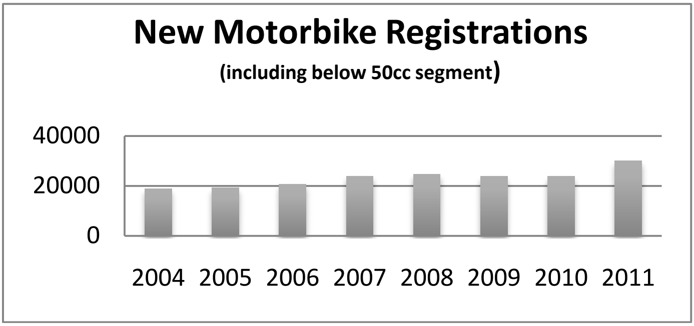
As motorcyclists demand high quality equipment, and Austria has only one domestic supplier (KTM), this market could offer good opportunities for US companies.

In addition, an underexploited facet of the 125cc market segment is that of the recently passed (in 2009) “Code B 111” decision, which allows drivers with a Class-B license (standard issue for passenger vehicles) to drive 125cc motorbikes after 6 hours of practice. These hours can be completed at any driving school or at either of the two largest driving clubs in Austria. Once completed, no test is required to receive the “B 111” license addition. This new development could have a direct impact in boosting the currently-modest growth of the 125cc market.

CURRENT MARKET TRENDS

The Austrian motorbike market is growing (1.3% in 2010). After an increase of motorcycle imports in the year of 2008 (36.9% - the highest increase since 1996), the imports of motorcycles in Austria fell during the financial crisis, with 20.8% less imports in 2009 and

10.8% less imports in 2010. The number of motorcycles produced locally was 57,160 in 2010, an 11.5% increase since 2009.



Main Competitors

The production of motorcycles in Austria is dominated by KTM, the only motorcycle manufacturer in the country. KTM's presence in the domestic market is strong, however it is outperformed by major imports such as Honda and BMW. In terms of Austrian-market performance, KTM ranks 6th in total market share, and 2nd behind BMW in the over 125cc segment. KTM is a worldwide exporter, with 96% of motorcycles produced in Austria being exported.

Harley-Davidson and Indian are the only two US brands with a share of the Austrian market. Harley-Davidson, though, has the lion's share of the US-motorcycle market in Austria, outselling Indian 872:1 in 2010 (Indian literally sold 1 motorcycle in Austria that year). Harley-Davidson also competes heavily in the over 125cc segment, and in 2010 ranked 7th in total sales within this segment. As to Indian, the company sold one motorcycle in Austria over the period January 2009 – March 2011

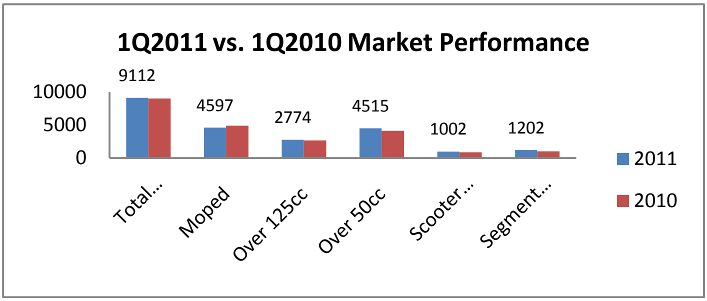
Raning	**Nam**	**Tota**	**Mopeds**	**Oveder 125cc**	**Scooters 5cc**	**125cc ment**	**Overc**	**Over 5cc**
	Total	*47498*	*25875*	*4008*	*5670*	*7034*	*21623*	*11945*
1	Piaggio	7037	3310	1587	2140	2140	3727	
2	Yamaha	3228	896	393	379	589	2332	1560
3	Ride	3149	3002	0	147	147	147	
4	Derbi	3133	2862	117	153	200	271	1
5	Honda	2646	6	433	831	1012	2640	1376
(9)	KTM	1683		24		24	1683	1659
(19)	Harley-Davidson	872		0			872	872
(63)	Indian	1		0			1	1

Source (www.arge2rad.at)

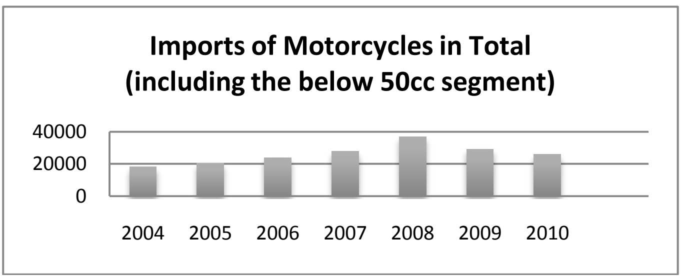
The Austrian motorcycle market is dominated by European and Japanese manufacturers: Yamaha, Piaggio, KTM, and BMW being perfect examples. Most motorcycles sold and registered are either 50cc or between 50cc and 125cc; the demand for mopeds and scooters as commuter and city transportation is greater than that for leisure and sport bikes, segments which typically consist of motorbikes greater than 125cc. Within the latter two segments, though, one American company (Harley-Davidson) has consistently performed well within Austria, ranking 7th in the over 125cc segment and 8th in the over 50cc segment in 2010 (domestic producer KTM and nearby German BMW ranked 1st and 2nd, respectively).

Current Demand

As of the end of the first quarter of this year (2011), the Austrian motorbike market has seen a 1.1% increase in sales over 1Q 2010. The greatest percentage increase was in 125cc Scooters at 15.97% (an increase in 138 units), with the 125cc market segment increasing 14.69% as a whole. The 125cc market segment also saw the largest per unit increase as compared with the other segments, with 154 more units sold in 1Q2011 than in 1Q2010; in second was the between 50cc and 125cc segment at 135 more units sold than in the same quarter of the previous year. The sale of Mopeds has continued to decline, however, with 292 units less being sold in 1Q2011 than in 1Q2010; that is a 5.97% decline. Below is a graph depicting each market segment's performance in 1Q2011 as compared to 1Q2010:



In 2010, there were 23,687 new registered motorcycles, of which only 1,918 were Austrian products. This indicates that the majority of new motorcycles registered in Austria are imported. The numbers of new motorbike registrations have gone up since last year (2010). Compared to 2009, 22.3% more new Harley Davidson motorcycles were registered in 2010. This led to the establishment of Harley Davidson GmbH's new office in Vienna along with the newly introduced position as Country Manager Austria.



Barriers

Austria is a highly developed open market with relatively liberal policies and sharp competition. The import climate is favorable towards U.S. products. American exporters, like domestic and European firms, are subject to packaging and other collection, recycling, and reprocessing laws. There are no significant trade barriers or limitations on U.S. motorcycles.

The import duty rate on motorcycles 250cc and below is 8%, while for motorcycles above 250cc it is 6%. There is also an import VAT of 20% (Einfuhrumsetzsteuer) on all motorcycles imported into Austria.

Trade Events

PS Show 2011 – Auto, Motorcycle, Motorsport and Tuning, October 2011, Wels
http://www.ps-show.at/
This show is a must for every person interested in motorcycles or motorsports. Over 38 brands advertize their latest developments and inventions to over 36,000 visitors.

Auto & Bike 2012 – April 2012, Klagenfurt
http://www.biztradeshows.com/trade-events/auto-bike.html
This trade show is organized by Klagenfurt Fair Company and is an excellent opportunity to capture sales leads and to showcase to thousands of visitors. It is an excellent platform to generate new business fortunes or to simply enjoy the latest trends and innovations in the automotive sector.

Resources

Association of Austrian Vehicle Industry
E-mail: kfz@wko.at, Web: http://www.wk.or.at/fahrzeuge/
The Association consists of about 170 member companies with more than 30,000 employees. The association helps with exporting goods into the world-wide market (Austria's export rate is greater than 90% in the automotive sector).

Arge 2Rad
E-mail: office@arge2rad.at, Web: http://www.arge2rad.at/index.php
Arge 2Rad is the umbrella organization for the motorcycle industry and motorcycle importers in Austria.

Statistik Austria – Wirtschaftskammer Österreich (Austrian Chamber of Commerce)
E-mail: info@statistik.gv.at, Web: http://www.statistik.at; http://portal.wko.at/wk/startseite.wk

BELGIUM

Capital: Brussels
Population: 11 million
GDP: $394 billion
Currency: Euro (EUR)
Language: Dutch, French, German

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export.gov/belgium/

SUMMARY

The Belgian motorcycle market closed the year 2010 with 26,441 newly registered motorcycles, which is a slight decrease of 3.8% compared to 2009. It remains a good volume, only a little bit lower than before and still the average volume of the last decade. The 125cc-segment was the most successful, with sales up to 4% higher than the year before. One third of all the new models sold, including quads, are scooters and motorbikes up to 125cc. Considering only two-wheeled motor bikes, their share increased to 41%. The reason for this success remains that people wishing to keep their individual mobility are entering this market. Especially because once you have your car drivers license for two years, you are allowed to drive a motorbike up to 125cc (max 11 kW) without having to get an additional license.

Top 10 of registered motorbikes in 2010. Among the top 10 best sold models, five are 125cm³ scooters. The brands Piaggio, Sym and Kymco are benefitting most from the increased interest in 125cm³ scooters. Facing a less favorable exchange rate, traditional Japanese brands like Honda, Suzuki, Kawasaki and Yamaha have become less popular. 125cm³ motorbikes are especially attractive for those buying their first motorbike.

BESTSELLERS IN 2009 AND 2010

Top 10	Brand	2010 units	Market Share%	2009 units	Market Share%	Growth% 2009 - 2010
1	Piaggio	4,014	15.18%	3,479	12.65%	15.38%
2	Yamaha	2,851	10.78%	3,553	12.92%	19.76%
3	Honda	2,578	9.75%	3,609	13.13%	28.57%
4	BMW	2,067	7.82%	2,057	7.48%	0.49%
5	Sym	1,772	6.70%	1,707	6.21%	3.81%
6	Suzuki	1,522	5.76%	1,755	6.38%	13.28%
7	Kawasaki	1,444	5.46%	1,665	6.06%	13.27%
8	Harley-Davidson	1,094	4.14%	1,032	3.75%	6.01%
9	Kymco	986	3.73%	782	2.84%	26.09%
10	Ducati	678	2.56%	671	2.44%	1.04%

There is also a strong used motorcycle market in Belgium. 73,679 used bikes were sold in 2010, a decrease of 5% compared with 2009.

MOTOR MARKET ACCORDING TO CYLINDER CAPACITY

As mentioned above, light motorbikes are very popular. Especially the 125cm³ segment has grown and reached a share of 38.55% of all registered bikes are in that segment. Also remarkable is the 4% increase in registrations in the 500 and 750cm³ segments. The sales of bikes over 1000cm³ decreased by 2%.

Registered motorbikes according to capacity				
	Total 2010	**%**	**Total 2009**	**%**
< 126 cm³	10,205	38.55	9,283	33.76
126 - 250 cm³	1,851	6.99	2,216	8.06
251 - 500 cm³	3,347	12.64	3,465	12.60
501 - 750 cm³	3,566	13.47	4,913	17.87
751 - 1000 cm³	2,734	10.33	3,136	11.41
> 1000 cm³	4,766	18.01	4,483	16.30
Total	26,469	100.00	27,496	100.00

TRADE EVENTS

European Motorshow Brussels January 10-22, 2012, Brussels, www.salonauto.be/en/salon/visiteur/news-infos/salon

RESOURCES & KEY CONTACTS

Associations
FEBIAC vzw (Belgian automotive suppliers association)
Woluwedal 46, bus 6
1200 Brussels
Tel: +32-2-778 6400
E-mail: info@febiac.be

FEDERAUTO VZW (Dealer and repair shop association)
Jules Bordetlaan 164
1140 Brussels
Tel: +32-2-778 6200
E-mail: mail@federauto.be


Race Generation.it
top performance, top quality ... best price !
ITALY's distributor of high quality Motorcycle accessories and aftermarket stuff
We import and distribute products made in USA and UK
KNOX
ODI
NUVO
SPECTRO Performance Oils
Two Brothers Racing U.S.A. Absolute Top Level
ITP
+ MX +
+ EXHAUST +
+ PROTECTIONS +
+ OILS +
+ ROAD +
+ TIRES +
+ WHELLS +
+ GRIPS +
+ ATV +
+ STREET +
+ HELMETS +
+ GLOVES +
+ ACCESSORIES +
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HEADQUARTERS: Viale Marconi, 35A - 15022 Bergamasco - AL - ITALY - Tel. +39 0131 777825 - Fax +39 0131 777635

CZECH REPUBLIC

Capital: Prague
Population: 10 million
GDP: $215 billion
Currency: Czech Crown (CZK)
Language: Czech

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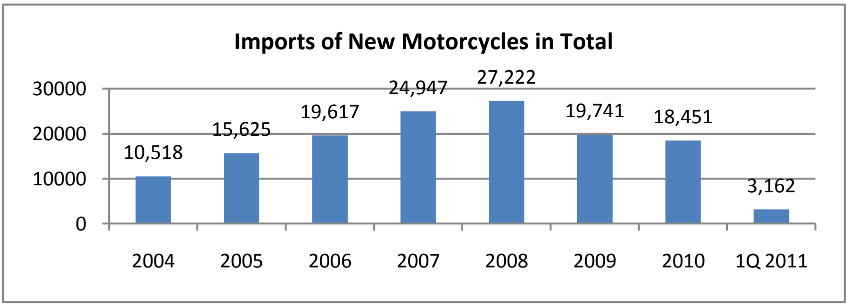
export.gov/czechrepublic

SUMMARY

In 2010, a total of 924,291 motorcycles were registered in the Czech Republic; 18,451 imported motorbikes were registered as new and 11,635 as used motorbikes. The majority of registered motorbikes and scooters is in the category below 50 cm^3.

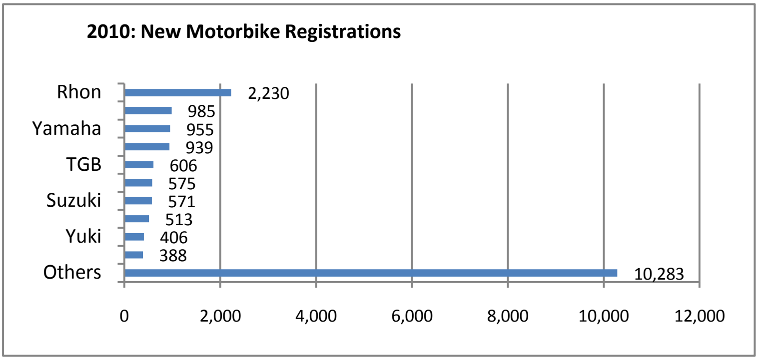
The average age of a motorbike on Czech roads is nearly 30 years. There are still a number of old JAWA motorbikes in use. JAWA was a Central European motorbike manufacturer, which produced over 3 million motorbikes from 1929-1987, and is still a Czech synonym for a reliable motorbike.

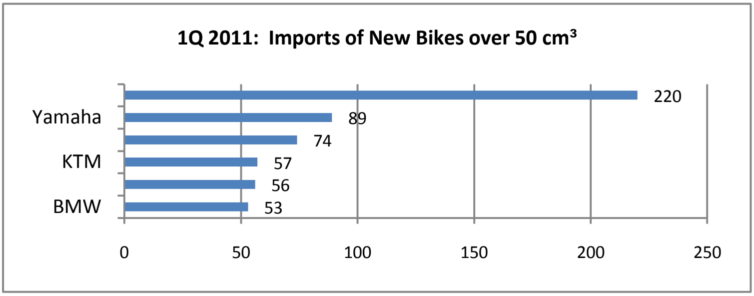
In 2010, the Czech Republic ranked 6th among Europe's automotive manufacturers and 12th worldwide; local motorbike production was negligible: only 782 units were manufactured locally. There are still some skilled small-size motorbike manufacturers in the country, but they focus on low-end products for the domestic market or on top custom bikes primarily for export. For example, the world's most powerful motorcycle, the MIDALU, was recently unveiled by Moto FGR following a six year development period and significant support from the Czech government www.motofgr.com. Production of this superbike will be limited.



Source: Czech Car Importers Association (SDA-CIA, http://portal.sda-cia.cz)

The recent financial crisis hit the Czech motorcycle market hard. An increase of imports is reported for the first quarter 2011 as the market jumped more than 15% in comparison with 2010. Sales are returning back to pre-crisis levels. There are 227 motorbike manufacturers represented in the Czech market. Import data of some of the most successful importers is shown below.





Source: Automotive Industry Association (www.autosap.cz)

BEST PROSPECTS

Parts for customizing motorbikes, protective clothing and helmets are the best sellers in the market. Motorbike enthusiasts request the highest quality parts and accessories, which provides good opportunities for American exporters.

TRADE EVENTS

MOTOSALON 2012 March 7 – 11, 2012, Brno, www.bvv.cz/motosalon-gb
MOTOCYKL 2012 March, 2012, Prague, www.motocykl-praha.cz

RESOURCES & KEY CONTACTS

Associations
Automotive Industry Association of the Czech Republic (AIA)
E-mail: autosap@autosap.cz, Web: www.autosap.cz
The AIA represents almost the entire automotive sector with 161 members and 125,000 employees in the Czech and Slovak republics.

Car Importers Association
E-mail: sda@sda-cia.cz, Web: www.sda-cia.cz

EUROPEAN UNION

Contact:
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Sylvia.Mohr@trade.gov
export.gov/eu/

SUMMARY

Safety of motorcycles, scooters, mopeds and tricycles for use on EU roads has been regulated since 1992. In 2002, the European Commission harmonized requirements and consolidated amendments for these two-, three- and four-wheel motorcycles by adopting directive 2002/24/EC, which is currently in force. This 2002 law is now undergoing review. The Commission hopes to simplify existing requirements for approval which are supposed to enter into force in July 2013 if the legislative process is completed as planned.

Motorcycles that fall within the scope of existing legislation require “type approval”; ie., the whole motorcycle and its individual parts are subject to a pre-market type approval procedure.

SCOPE

EU directive 2002/24/EC covers motorcycles (vehicles) intended for use on road. Components, technical units and systems are included in the scope and subject to separate legislation as specified in Annex II of 2002/24/EC. The text differentiates several categories of motorcycles:

- L1e are two wheel vehicles; maximum design speed of not more than 45 km/h
- L2e are three wheel vehicles; maximum design speed of not more than 45 km/h
- L3e are two wheel vehicles without sidecar
- L4e are two wheel vehicles with a sidecar
- L5e are tricycles (engine/speed limitations over 45 km/h)
- L6e are light quadricycles with an unladen mass of not more than 350 kg (treated the same way as L2e)
- L7e are quadricycles with an unladen mass of not more than 400 kg (treated the same way as L5The current law excludes:
- individual motorcycles
- vehicles with a design speed not exceeding 6 km/h
- vehicles used in competition (on- and off-road)
- vehicles for physically handicapped
- vehicles for pedestrian control
- tractors and machines
- vehicles for off-road leisure with 1 wheel in front, 2 in the back
- cycles with pedals and an electric motor, maximum speed not exceeding 25 km/h

Products which are not covered in the scope of the motorcycle directive may be regulated by other legislation; for example, electric bicycles require compliance with EU electrical safety legislation. Tractors and machines are regulated separately. For example, an all-terrain-vehicle for off-road use is regulated as a machine under the machine safety directive.

TYPE APPROVAL AND CERTIFICATE OF CONFORMITY

Whole Motorcycle

Current legislation applies to whole motorcycles for serial production based on a type-approved model. The type-approved model consists of type-approved components which were tested and certified separately by individual manufacturers. Already at the stage of design of the motorcycle, the manufacturer should keep EU safety and environmental requirements in mind and document compliance throughout production and testing. Testing can be done in the United States (see relevant weblinks below). The documented specifications and test results will have to be submitted for approval of the motorcycle as a whole.

EU motorcycle legislation contains a form (Annex II) which specifies the content to be supplied by the manufacturer for approval of the motorcycle, its parts, technical units or systems. This form includes every safety or environmental aspect of the motorcycle – engine, transmission, lighting, noise emissions as well as “position for the mounting of the rear registration plate” among others - all of which are covered by separate directives, such as directive 93/14/EC for braking systems. Manufacturers have to comply with the separate directives listed in Part 2 of Annex II as well as the directive 2002/24/EC (see further).

The information form/package should be sent to a national approval authority in one of the 27 EU member states*. The national approval authority will check conformity of production and grant type approval subject to testing. The approval authority will present a completed type approval form to the applicant and send a copy of the type approval certificate to all EU member states within one month, as well as listings of approved parts, systems, and separate technical units. This process of information sharing among member states facilitates acceptance of the motorcycle on the market in other EU member countries.

After receipt of type approval, the manufacturer creates a certificate of conformity which accompanies each motorcycle. The certificate model can be found in Annex IV-B.

Separate Parts, Units and Systems

Current legislation also refers to separate legislation covering individual parts, technical units and systems of motorcycles. These have to be manufactured in accordance with specific product legislation as referenced in 2002/24/EC. They will need to be assessed, tested and certified just like the whole vehicle approval procedure described above. Original (OEM) components do not need a certificate of conformity; non-OEM components do need a certificate of conformity provided by the manufacturer. Parts, units and components usually show a factory or trade mark and, where required, a little e mark (type approval mark) as shown in the Appendix of Annex V.

Custom-Made or Individual Motorcycles

Custom-made or individual motorcycles are subject to type-approval at member state level. The requirements may vary country-by-country. Manufacturers or owners of motorcycles may have to modify certain aspects of their vehicle in order to obtain approval for registration of their vehicle. The assessment will cover, among others, tires, emissions, brakes, headlamps. Certificates of conformity of type-approved parts, technical units and systems will be accepted.

Ongoing Review of Legislation

In October 2010, the Commission published draft regulation COM(2010)542 to replace existing motorcycle legislation 2002/24/EC. With this proposal, the Commission introduces a simplified framework for type approval, which will be supplemented by separate texts. New requirements are, among others:

- anti-tampering provisions
- vehicle masses and dimensions
- future references to UN/ECE regulations
- exchange of repair and maintenance information
- market surveillance obligations for member states
- type approval process and provision for certificates of conformity

The timeline for adoption - if the legislative process is completed as planned - is October 2011 with possible entry into force by January 2013. To track the legislative process, use this link:
http://ec.europa.eu/prelex/detail_dossier_real.cfm?CL=en&DosId=199718

SUMMING UP

Manufacturers of motorcycles have to apply for type approval prior to bringing their vehicles on the EU market. Compliance will be assessed against motorcycle directive 2002/24/EC. Manufacturers of individual parts, both OEM and non-OEM, also have to ensure that their products are compliant with product specific legislation, if applicable. Relevant documents can be downloaded free for charge from Commission websites:
http://ec.europa.eu/enterprise/sectors/automotive/documents/directives/index_en.htm

WEBSITES EUROPEAN ASSOCIATIONS

Motorcycle association of Europe (ACEM) - www.acem.eu
Road Riding Motorcyclists Federation of Europe (FEMA) - www.fema-online.eu
European Motorcycle Union (UME) – www.uem-moto.eu
European Two-wheel Retailers Association (ETRA) – www.etra-eu.com

Approval Bodies:
http://ec.europa.eu/enterprise/sectors/automotive/approval-authorities-technical-services/approval-authorities/index_en.htm

Testing/Certification Services:

US (*not an exhaustive list*!)
http://www.vcana.com/vehicletype/type-approval-for-mo.asp
http://www.tuev-nord.de/en/Importing_vehicles_2732.htm

EU
http://ec.europa.eu/enterprise/sectors/automotive/approval-authorities-technical-services/technical-services/index_en.htm

* EU member states: Austria, Belgium, Bulgaria, Czech Republic, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

For More Information:
The U.S. Commercial Service at the U.S. Mission to the European Union is located at Boulevard du Regent 27, Brussels BE-1000, Belgium, and can be contacted via e-mail at: brussels.ec.office.box@trade.gov; or by visiting the website: www.export.gov/europeanunion.

MOTORCYCLE TYPE APPROVAL

Access to European Markets

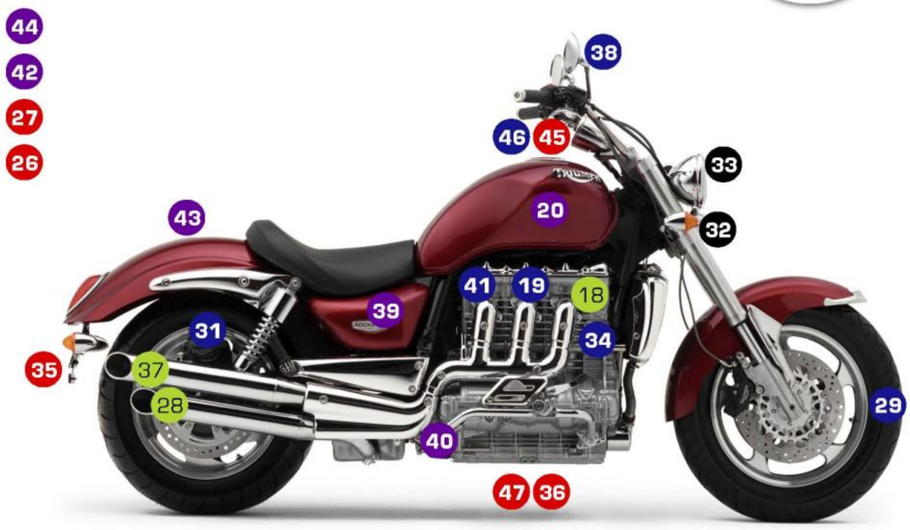


Image courtesy of Triumph Motorcycles

Applicable standards

Standards correct at time of publication (Aug 11)

Passive Safety

20. Fuel tank
39. External projections
40. Stands for two wheeled vehicles
43. Passenger hand-hold for two-wheel-vehicles

Environment

18. Maximum design speed, maximum-torque and power
28. Anti-air pollution measures
37. Sound level and exhaust system

Other Directives

26. Masses and dimensions
27. Motorcycle trailer coupling devices
35. Position for the mounting of rear registration plate
36. Electromagnetic compatibility
44. Anchorage points and safety belts for 3/4 wheeled motorcycles
45. Speedometer
47. Statutory markings
42. Windshields, glazing, washers, de icers & demisters for 3/4 wheeled vehicles

Active Safety

19. Anti-tampering measures
29. Tyres
31. Braking system
34. Audible warning devices
41. Devices to prevent unauthorised use of this vehicle
38. Rear-view mirror(s)
46. Identification of controls, tell-tale and indicators

Lighting Equipment

32. Installation of lighting and light-signalling devices
33. Lighting and light-signalling devices

If you want to sell your products in European markets then VCA North America (VCA NA) can help. VCA NA is an office of the UK Department for Transport Vehicle Certification Agency – the UK's vehicle type approval authority and technical service - which means that we can witness tests and issue approvals right here in the USA. VCA NA was established in 1991 and has helped hundreds of manufacturers to obtain the certifications they need to sell their products in Europe and beyond.

To find out more contact:

VCA North America
41000 West Seven Mile Road
Suite 140
Northville, MI 48167-2664
USA

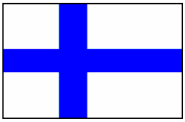
general@vcana.com

(001) 248-468-0151

VCA – Delivering a Safer Environment

www.vcana.com

FINLAND



Capital: Helsinki
Population: 5.38 million
GDP: $239 billion
Currency: Euro (EUR)
Language: Finnish, Swedish

Contact:
U.S Commercial Service Helsinki
Ms. Tarja Kunnas
Commercial Specialist
Tel. +358-9-616 25345
Fax: +358-9-616 25130
Tarja.Kunnas@trade.gov
export.gov/finland/

SUMMARY

Finland is a northern European country with a population of 5.3 million people. The motorcycle and moped market is impacted by the large seasonal climate variation, with decreasing sales in the winter months and increased demand in late spring and summer. April and May tend to see the largest numbers of new registrations.

The number of people taking the test for a moped license increased in May 2011, with 24,000 new licenses granted (an increase of 62.5% over May 2010). This was caused by a change in the licensing requirements effective in June 2011: to get a moped license, Fins now need to pass a driving test in addition to the written test that was previously the only requirement.

The slowdown in 2009 and 2010 saw registrations of new motorcycles and mopeds decline to 2003 levels. In 2011, the moped market is expected to recover, with a growth of about seven percent between January and June. The motorcycle market, however, has been slow in 2011, due to the slump in sales of larger, over 750 cm^3 motorcycles. Contributing factors include cool spring weather plus the recent difficulties importing Japanese motorcycles, caused by the disaster in Japan in March. However, sales of small 125 cm^3 motorcycles have increased more than 40% in the month of June, compared with June of 2010.

MARKED DEMAND

At year's end 2010, 225,504 motorcycles and 258,241 mopeds were registered in Finland, a little over 6,000 new motorcycles along with more than 18,000 new mopeds. Experts anticipate an increase in demand in 2011. The largest and fastest growing branch is light quad-cycles. In 2010, their sales increased by about 19%.

Finland has no current motorcycle production of its own. The largest importers are Japan, the United States, Italy and Germany. The most popular brands are Yamaha, KTM, Honda, Suzuki, Kawasaki and Harley-Davidson.

Yamaha is the market leader and benefitted especially from the increase in sales of 125 cm^3 motorcycles in 2011, leaving it with a 20% market share in January-July, compared to 11.5% the year before. KTM also saw a significant increase in registrations of its popular 125 cm^3 "Duke" model, Harley-Davidson nearly doubled its market share, to just below 10%. In the large, over 250 cm^3 motorcycles segment, BMW became the market leader in

2011. In the moped segment, Chinese "Solifer," originally manufactured in Finland, and Peugeot are market leaders, with Keeway, Derby and Yamaha following behind. Currently, light motorcycles and mopeds are in demand, the segment of larger motorcycles is also expected to recover.

MARKET DATA

Finland - New motorcycle and moped registrations by month

	Motorcycles		Mopeds	
Month	**2010**	**2011**	**2010**	**2011**
January	102	90	228	238
February	151	161	239	481
March	347	315	1,009	1,320
April	1,612	1,377	4,111	3,787
May	1,347	1,372	3,601	3,754
June	929	859	2,448	2,850
July	699	-	2,406	-
August	458	-	2,077	-
September	251	-	1,138	-
October	100	-	573	-
November	36	-	108	-
December	22	-	160	-
Jan-Jun	4,488	4,174	11,636	12,430
Total	6,054	-	18,198	-

Source: Finnish Transport Safety Agency (Traffic)

BEST PROSPECTS

Moped sales have increased in 2011, and light motorcycles are also in demand. Categorized within moped sales, demand for so-called 3- or 4-wheelers powered by engines below 700 cm^3 has also been strong.

MARKET ENTRY

Mopeds are exempt from taxation in Finland, but motorcycles are taxed 9.8 – 24.4% of their retail value, based on engine volume. All motor vehicles in use must be registered and type approved. In Finland, a moped will be considered a motorcycle when its speed exceeds 45 km/hour. Tuning mopeds into motorcycles is not in itself against the law, but driving one on a public road without a motorcycle license or registering one as a moped is.

TRADE EVENTS

Electric Motor Show November 24-27, 2011, Helsinki,
web.finnexpo.fi/Sites1/ElectricMotorShow/en/Pages/default.aspx

RESOURCES & KEY CONTACTS

Finnish Transport Safety Agency www.trafi.fi/en

ASSOCIATIONS

Association of Finnish Technical Traders/Motorcycle Department
http://tekninen.fi/yhdistys/jaostot/moottoripyoeraejaosto
Motorcycle Traders Association www.mpkauppiaat.fi/Etusivu.html

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FRANCE

Capital:	Paris
Population:	65.8 million
GDP:	$2.6 trillion
Currency:	Euro (EUR)
Language:	French

Contact:
U.S. Commercial Service Paris
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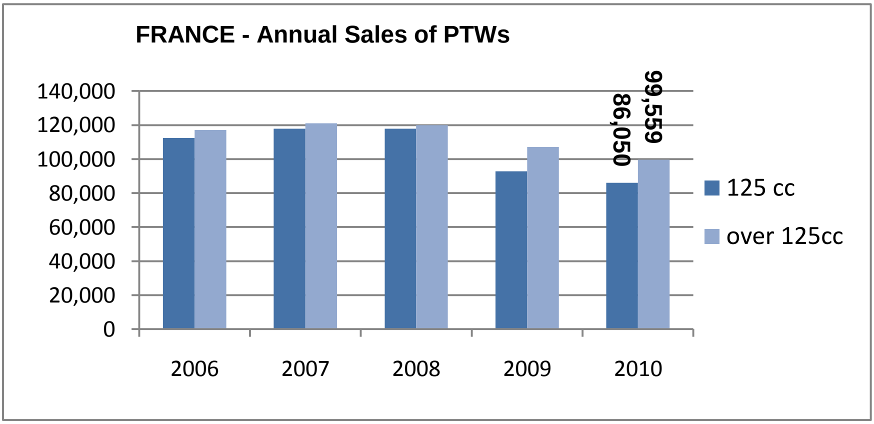
Fax: + 33-1-4312 7050
Stephanie.Pencole@trade.gov
export.gov/france

SUMMARY

France is the third largest manufacturer of powered 2-wheel vehicles in Europe. Production in 2009 was 109,705 vehicles, about 13% of European output. The country ranks fourth in the number of motorcycles on the road in Europe with 3,532,000 registered vehicles in 2009 (1,748,000 million mopeds under 50cm³ and 1,784,000 million motorcycles over 50cm³).

France also is the second largest market for new motorcycles and mopeds in Europe with 343,117 new registrations in 2010. It is particularly strong in mopeds and led Europe with 138,018 new moped registrations in 2010. 185,609 motorcycles and scooters were sold in 2010. 86,050 of these sales were motorcycles less than 125cm³ and 99,559 were over 125cm³. Annual French Sales of Powered Two-Wheelers (PTWs):

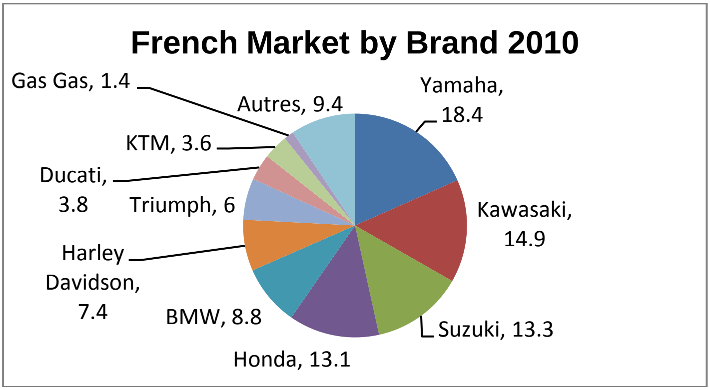


Source: Moto-net.com le Journal Moto du Net

IMPORT/EXPORT

Most imports of motorcycles/scooters/mopeds come from Italy and Japan (21 and 20% of all imports, respectively).

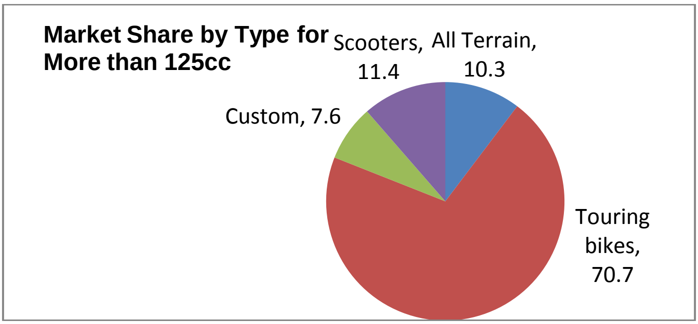
Other imports come mainly from other Western European countries, especially Spain and Belgium, with China being the only non-European (other than Japan) country in the top 10 exporters to France. Imports from the United States account for only 1.42% of total imports. However, the market share of the United States increased by 50% from 2008 to 2009 and increased again by 177% from 2009 to 2010.



Source: Moto-net.com le Journal Moto du Net

COMPETITION

Italy is by far the largest producer of motorcycles in Europe. Spain is the second largest and France comes third. As in Italy, Spain and Germany, the production of motorcycles has declined significantly in the past five years. The main motorcycle/ moped manufacturers in France are Peugeot and MBK. The accessories and safety devices market in France relies heavily on imports, mostly from Italy and Belgium. France has a trade deficit of $509,064 with the United States in motorcycle accessories. Some of the major French distributors of motorcycle accessories include: Moto Expert, www.motoexpert.fr, Speedway, www.speedway.fr, Dafy Moto, www.dafy-moto.com, and Tecno Globe, www.tecnoglobe.com.



Source: Moto-net.com le Journal Moto du Net

BEST PROSPECTS

France experienced strong growth in sales of upscale leisure products during 2010, regaining pre-crisis levels. This growth slowed in the beginning of 2011 and is expected to stagnate by mid-2011. The motorcycle market saw excellent performances by BMW, Harley Davidson, Triumph, KTM, Ducati and Aprilia. The French are particularly interested in scooters, and demand is higher than in other European countries.

Peugeot recently released an electric scooter called e-Vivacity which is reportedly more economical, performs better, and is more environment-friendly than traditional scooters. The e-Mb by Matra was designed specifically for commuting in the city. Some cities in France such as Paris are encouraging individuals to buy electric scooters by subsidizing the purchase at a maximum of €400 (up to 25% of the selling price).
There is strong competition from European and Asian brands. Best sales opportunities may include accessories for the vehicle or the rider.

TRADE EVENTS

Mondial Du Deux Roues, Paris International Two-Wheel Show, November 30-December 4, 2011, Paris, www.lesalondelamoto.com

Salon Du Deux Roues, Two-Wheel Show at Lyon, March 2-4 2012, www.salondu2roues.com

RESOURCES & KEY CONTACTS

Associations
ACEM, the European Motorcycle Association, www.acem.eu
Chambre Syndicale de l'Automobile et du Motocycle (CSIAM), French Automobile and Motorcycle Union www.csiam-fr.org

Fédération Française de Motocyclisme (FFM) French Motorcycle Federation www.ffmoto.org

Fédération Française des Motards en Colère (FFMC) French Federation of Angry Motorcyclists www.ffmc.asso.fr

The Federation of European Motorcyclists' Associations (FEMA) www.fema-online.eu

Media
Eurosport Group is the leading multimedia platform in Europe with Eurosport, Eurosport 2, Eurosport.com, Eurosport Player, Eurosportnews, Eurosport Mobile and Eurosport Events. www.eurosport.fr/auto-moto

Moto Magazine, www.motomag.com

Moto-net.com, www.moto-net.com

GERMANY

Capital: Berlin
Population: 81.8 million
GDP: $3.3 trillion
Currency: Euro (EUR)
Language: German

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SUMMARY

There were about 33 million powered two-wheelers in Europe in 2008, according to the Association of European Manufacturers of Motorcycles (ACEM), of which 66% were motorcycles. ACEM forecasts an increase to 37 million by 2020. The countries with the highest number of new registrations were Italy (5.9 million), Germany (3.7 million), Spain (2.5 million) and France (1.4 million).

Almost 3.8 million motorcycles and scooters with engines over 125 cm^3 are registered in Germany. In addition to using motorcycles as a means to spend fascinating and inspiring leisure time, an increasing number of people use them as quick and space-saving alternatives in the daily growing individual traffic on German roads.

The market for scooters has been benefitting from congested cities and rising gas prices. Larger motorbikes have become “must-have” lifestyle accessories for young-at-heart riders of all ages. However, after several years of growth, sales of two-wheelers in Germany declined by 4.8% in 2010.

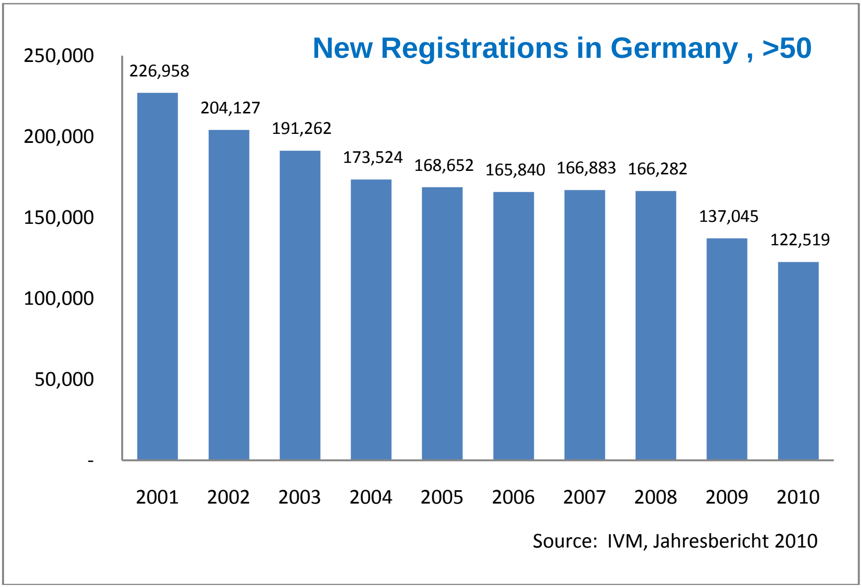
Sport motorcycles, despite a slight decline in 2010 sales, remain the most popular bikes in Germany:

Market Share of Motorcycles (>50cm³) according to Market Segment, 2010		
Market Segment	**Market Share,%**	**Change 2009 - 2010, in%**
Sport	32.92	-0.08
Enduro	22.50	+2.16
Chopper	13.00	+0.50
Klassik	13.00	-0.01
Supersport	11.59	-1.91
Touring bike/ luxury tourer	5.31	-1.09
Others	1.67	

Source: IVM, Jahresbericht 2010

MARKET DATA

Except for a slight increase in 2006-2007, the German two-wheeler (50 cm³ and above) market experienced a negative trend over the last 10 years, but increased by 8% in January 2011, compared with the previous month. Presently, Germany counts 3.8 million registered two-wheelers. This includes motorcycles, scooters, mopeds, small motorcycles and motor-assisted bicycles, but does not include unlicensed off-road bikes or unregistered bikes. Germany thus remains one of the strongest markets for two-wheelers in Europe. In the EU, only Italy surpasses Germany in new registrations.



SCOOTERS

Particularly for young adults, scooters offer affordable transportation. Low purchase costs and gasoline consumption of about 2 liters per 100 kilometers guarantee cheap mobility in times of record gasoline prices (1 liter of unleaded fuel sold for an average of €1.5 in 2010, approximately $8.4/gallon). Also, scooters are regarded as smart alternatives to cars in increasingly congested inner city streets with parking limitations. Nonetheless, in 2010, new registrations decreased by 18% compared with 2009.

Market Shares in Germany (2010)	
Manufacturer	**Market Share in%**
BMW	22.20
Honda	12.91
Suzuki	12.33
Kawasaki	10.61
Yamaha	10.50
Harley-Davidson	9.70
KTM	5.30
Triumph	4.70
Ducati	4.00
Aprilia	1.90
Moto-Guzzi	0.90
Buell	0.90
Others	4.10

Source: IVM, Jahresbericht 2010

KEY SUPPLIERS

BMW is the market leader with more than one fifth of the market share. Honda follows with almost 13%, and Suzuki's market share adds up to 12%. Kawasaki and Yamaha are ranked 4 and 5 in the market, respectively.

Harley-Davidson enjoys a cult status with Germans of all ages. It is trendy for lawyers, dentists, bankers and young urban professionals to own a Harley. Since those bikes sell for a relatively high price and since accessories are a "pricy must", the numbers of units sold are comparatively low.

Motorbikes with engines over 50 cm^3 constitute a large part of the German two-wheeler market (65%). Larger bikes are particularly popular with buyers who are 30 years of age or older: they can afford to buy and maintain such bikes.

PROSPECTIVE BUYERS

The two-wheeler market in Germany has been greatly strengthened by the fact that motorbikes have penetrated all social classes. This has led to the creation of many biking communities and most importantly, made motorbike riding a social and recreational activity. The percentage of female bikers has increased slowly but constantly, with women focusing on styling and rider-friendly design rather than speed, horsepower or cubic capacity. Also, additional services offered are a purchasing decision factor for female bikers. Popular services include, for example special training, repair workshops, try-out rentals and tour offers.

MARKET ENTRY

Any motor vehicle model to be operated on public streets in Germany has to be approved by the German Technical Inspection Agency (TÜV) in advance. Also, certain subsequently added custom parts, which have a bearing on the operational qualities/attributes of a vehicle, have to be approved by the TÜV. Otherwise, the operating license and the insurance coverage become invalid.

MARKET ISSUES & OBSTACLES

Driving License Regulation Changes and EU Harmonization affecting Motorcycle Classification and Sales Potential.

In Germany, a driving license for cars includes the operation of light motorcycles with a cubic capacity not exceeding 125 cm^3, if the license was issued before April 1, 1980. After that date, drivers must pass an additional test. The driving license class A1 for light motorcycles with a maximum cubic capacity not exceeding 125 cm^3 and a power output of 11 kW (15 hp) was defined and implemented Europe-wide for the very first time in mid-2007.

The power/weight ratio is a newly introduced term and the idea to prorate each kilowatt (1.36 hp) to at least 10 kg of motorcycle weight does not really make a light motorcycle a light weight. For an allowed maximum of 11 kW, it must weigh 110 kg.

The legal minimum age for motorcycle drivers is 16. There are age intervals of two years between license classes, that quasi serve as probationary periods. After this waiting period, additional tests have to be passed to move from class A1 to A (open access class). All EU member states are authorized, however, to individually raise the minimum age by 2 years.

The 3rd European Driving License Regulation, which refers to an easier access to smaller motorcycles classes, wasn't implemented in Germany.

TRADE EVENTS

Essen Motor Show, November 26 – December 4, 2011, Essen, www.essen-motorshow.de
Internationale Motorradmesse, January 27-29, 2012, Friedrichshafen, www.motorradwelt-bodensee.de
The INTERMOT Trade Fair, October 3-7, 2012, Cologne, www.intermot-koeln.com

RESOURCES & KEY CONTACTS

Associations

The German Motorcycle Industry Association e.V. (IVM - Industrie-Verband Motorrad Deutschland e.V.): www.ivm-ev.de, Email: ivm-ev@ivm-ev.de, Industrie-Verband Motorrad Deutschland e. V., Gladbecker Str. 425, D-45329 Essen, Phone: +49 201 83403-0, Fax: +49 201 83403-20:

Zweirad-Industrie-Verband (ZIV), contact@ziv-zweirad.de, www.ziv-zweirad.de/organisation.html , Zweirad-Industrie-Verband, Königsteiner Straße 20a, 65812 Bad Soden a. Ts., Telefon: 0 61 96 / 50 77-0, Telefax: 0 61 96 / 50 77-20.

Media

Publisher: Motor Presse Stuttgart GmbH & Co. KG. Magazine: MOTORRAD magazine, www.motorradonline.de/ (circulation approx 135.000, one of Europe's largest magazines, biweekly, since 1903.
Publisher: MO Medien Verlag. www.mo-web.de Magazine: MOTORRADMAGAZIN MO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GREECE

Capital: Athens
Population: 10.79 million
GDP: $322 billion
Currency: Euro (EUR)
Language: Greek

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SUMMARY

Motorcycles in Greece are traditionally seen as a means of transportation and not as sporting goods. Many Greek commuters prefer bikes over cars because they are easier to maneuver through tight traffic in cities and can be acquired and operated at a fraction of the cost of a car. Greece's weather makes it possible to use motorcycles throughout the year.

Bicycles do not present an alternative for commuting because most Greek towns and other residential areas have fairly steep hills. Businesses such as couriers, food and other delivery companies, law enforcement agencies and even emergency health professionals use motorcycles. Motorcycle rental is a popular business in many tourist destinations. Technically, there is a distinction between motorcycles and mopeds: Mopeds are smaller and equipped with engines up to 50 cm³ and their speed should not exceed 45 km (28 miles) per hour. Certain three and four wheeled vehicles are classified as mopeds as long as their weight does not exceed 350 kg (770 lbs.). Mopeds enjoy lower annual road tax, lower insurance premiums and lower tolls than motorcycles, and require a simpler type of driving license, which can also be issued to young people (16 and above with parental consent).

MOTORCYCLE (ABOVE 50 CM³) REGISTRATIONS BY MONTH DURING THE YEARS 2008-2011

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Year													
2008	5,219	5,037	6,302	9,353	11,014	13,251	16,086	9,147	9,884	7,018	4,623	3,184	100,118
2009	4,252	4,020	4,089	5,264	8,436	9,956	10,750	6,575	6,178	4,841	4,421	3,884	71,666
2010	3,924	2,844	4,916	6,121	7,527	8,285	8,243	5,284	5,350	4,151	3,096	2,157	61,898
2011	3,304	2,629	3,148	4,232	5,584	N/A	N/A	N/A	N/A	N/A	N/A	N/A	18,897

Source: Association of Motor Vehicle Importers Representatives

Traditionally the months of April thru August show the highest number of new registrations of imported, used motorcycles. Less than 3% of the new registrations are for second-hand motorcycles that are imported into Greece.

The distribution of motorcycles by territory below shows the majority of registrations take place in and around the capital of Greece, Athens.

MOTORCYCLE REGISTRATIONS BY TERRITORY FOR THE MONTH OF APRIL 2010 AND APRIL 2011

Area	Athens	Thes/niki	Epirus	Thessaly	Thrace	Crete	Macedonia	Aegean Islands	Ionian Islands	Pelepon	Central	Total
2010	2,623	435	167	350	165	491	378	481	181	585	265	6,121
2011	1,761	315	105	264	140	319	239	334	183	413	158	4,232

Source: Association of Motor Vehicle Importers Representatives

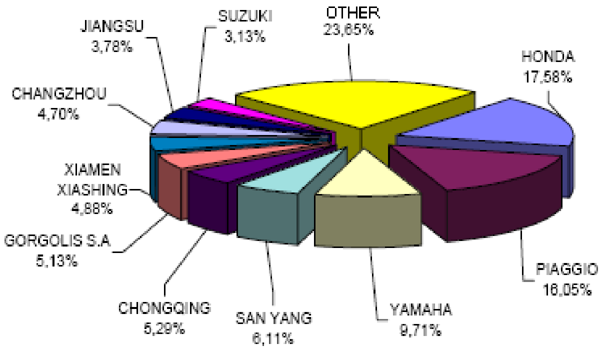
MOPEDS REGISTERED (BELOW 50CM^3) 2008-2011

Years	Units
2008	25,000
2009	20,380
2010	18,800
2011 (Jan-May)	6,220

Source: Association of Motor Vehicle Importers Representatives

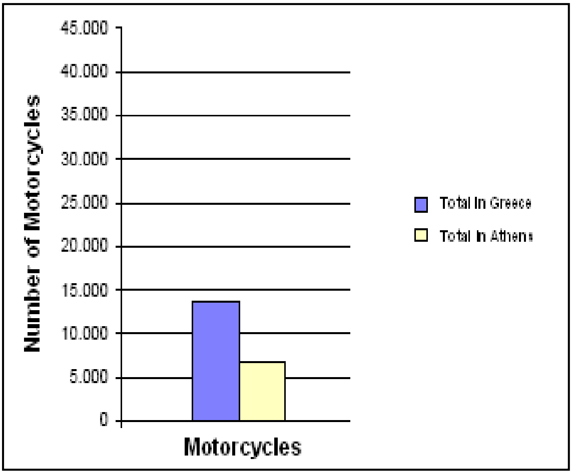
There are more mopeds imported into Greece than motorcycles.

SALES OF NEW MOTORCYCLES BY BRAND, JANUARY - APRIL 2011



Source: Hellenic Statistical Authority (EL. STAT.)

NEW REGISTRATIONS OF MOTORCYCLES, JANUARY - APRIL 2011 IN ATHENS VERSUS THE ENTIRE COUNTRY



Source: Hellenic Statistical Authority (EL. STAT.)

TRADE EVENTS

The "Exhibition of Motorcycle, Scooters & Accessories", planned for May 2011 was canceled because of insufficient exhibitor interest.

RESOURCES & KEY CONTACTS

Associations
Association of Motor Vehicle Importers Representatives
www.seaa.gr

Motorcycle and Motorcycle Accessories Stores in Greece
Please note: The following companies have not been vetted by the US Commercial Service, Athens, Greece.
www.moto-city.com/wiki/index.php/Main/MotorcycleStoresGreece
www.moto-city.com/wiki/index.php/Main/MotorcycleWholesalersGreece
www.evresi.gr/data/index.php?action=showcat&idcat=171
www.list-of-companies.org/Greece/Automobiles_Motorcycles/Motorcycle_Accessories/

Hellenic Statistical Authority (EL.STAT.)
Email: info@statistics.gr Web: www.statistics.gr

HUNGARY

Capital:	Budapest
Population:	10 million
GDP:	$212 billion
Currency:	Hungarian Forint (HUF)
Language:	Hungarian

Contact:
U.S Commercial Service Budapest
Ms. Csilla Virágos
Commercial Specialist
Tel. +36-1-475-4250
Fax: +36-1-475-4676
Csilla.Viragos@trade.gov
export.gov/hungary

SUMMARY

Currently 150,000 motorbikes are registered in the country with an average age of 11-15 years. Motorbike sales have been decreasing in the past three years in Hungary and may continue to stagnate in 2011. While last year only 2,268 motorbikes were sold, the Hungarian Vehicle Importers Association (MGE) forecast total sales of 3,200 new motorcycles for 2011. Scooters or mopeds (50 cm^3 or below) without license plates have been more popular recently, as they are not subject to local vehicle taxes such as weight tax or registration tax.

MARKET DATA

In April 2011, only 259 new motorcycles were sold compared with 406 sold in April 2010. In the first four month of 2011, 488 new motorcycles were registered. The peak years for motorcycles sales were 2005 and 2006 when more than 18,000 motorcycles and scooters were sold. Motorcycle sales show similar trends as passenger car sales: the vast majority of new motorcycle registrations take place in the first half of the year due to the seasonal nature of consumer demand in this sector.

According to the MGE, the registration tax introduced in January 2007 had a significant negative impact on motorcycle sales figures. Until the introduction of this tax, motorbikes over 250 cm^3 were popular, but since the introduction of the tax, demand for 50 to 125 cm^3 vehicles increased. For large engine motorcycles, the tax can be up to 25-30% of the retail price of the vehicle.

Presently, there is no domestic production. There are plans, however, to revive the traditional Hungarian motorcycle brand “Pannónia”. “Pannónia” was produced throughout most of the 1900s, until production was discontinued in 1975. A Hungarian investor is now hoping to take advantage of the brand's nostalgic value as well as the ongoing retro trend. Magyar Motorkerékpár Kft. will start producing the “Pannónia” in Varpalota (southwest Hungary) in 2012.

EU motorcycle safety and emission standards have been introduced in Hungary, including mandatory advanced braking systems on new motorcycles and automatic headlamp-on switching for all “L-category” vehicles. This category covers a wide range of vehicles such as two- or three-wheel powered cycles, mopeds, motorcycles with and without a side-car, tricycles, on-road quads and mini-cars. The proposal sets ambitious emission requirements for these vehicles.

The following brands of motorbikes are most popular among Hungarian consumers: Aprilia, BMW, Ducati, Harley-Davidson, Honda, Kawasaki, KTM, Malaguti, Pannonia, Piaggio, Suzuki and Yamaha.

Motorbikes	Unit	2007	2008	2009	2010
Average Age of Motorbikes	Years	14.7	14.8	15.4	16.1
Number of Motorbikes Used on Roads in Hungary	Units	135,865	141,540	141,956	142,251

Source: Hungarian Statistical Office on-line database

TRADE EVENTS

Budapest Motor Festival, March 22-23, 2012, Budapest www.motor.hungexpo.hu

RESOURCES & KEY CONTACTS

Association
MGE **-** Hungarian Vehicle Importers Association
www.mge.hu

ISRAEL

Capital: Jerusalem
Population: 7.7 million
GDP: $213 billion
Currency: Shekel (ILS)
Language: Hebrew, Arabic

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SUMMARY

In the past decade, the Government of Israel has tried to establish an efficient mass transit system in order to reduce the dependency on private vehicles as the major mode of transportation, and to alleviate the massive traffic congestions on intercity roads. Commute distances between Israel's three major cities (Tel Aviv, Jerusalem and Haifa) range between 60 km to 95 km; and it is approximately 35 km from and around the greater Tel Aviv metropolitan area to downtown.

Unfortunately, most of the major national transportation infrastructure projects are way behind budget and deadline. In the meantime, Israelis have turned to two-wheeled vehicles in an effort to beat the congestion in and around the main cities.

In 2010, 113,007 motorcycles were registered in Israel, of which 60.1% were imported from Taiwan. In the first ten months of 2010, the market declined by about 20% in comparison to 2009 due to excessive insurance premiums levied on motorcycles. The 125cm^3 category makes up about 54% of the entire two wheeler market; the 250cm^3 group about 30%.

The Israel Two Wheel Vehicle Importers Association estimates that 95% of registered motorcycles are scooters, a segment which was impacted by the decline in sales. 100cm^3 and 200cm^3 motorcycles are generally unpopular in Israel as is the 300cm^3 scooter. Israeli consumers are unwilling to compromise on quality and are very cost conscience.

CHART #1: MARKET SIZE (NEW REGISTRATIONS) -- (MOTORCYCLES AND SCOOTERS OVER CM^3)

Registration data by market segments: 1-10/2009 vs. 1-10/2010

CC	1-10/2009	Market share	1-10/2010	Market share	CHANGE %
50	238	1.5%	183	1.4%	-23.11
51-125	8,834	54.9%	6,958	54.1%	-21.24
126-250	4,416	27.5%	3,738	29.1%	-15.35
251-500	1,587	9.9%	1,292	10.0%	-18.59
501-750	520	3.2%	354	2.8%	-31.92
750+	436	2.7%	332	2.6%	-23.85
Electric	56	0.3%	5	0.0%	-91.07
Total	**16,087**	**100%**	**12,862**	**100%**	**-20.05**

Source: Central Bureau of Statistics

Registration data by market segments: 1-3/2010 vs. 1-3/2011					
CC	1-3/2010	Market share	1-3/2011	Market share	CHANGE %
50	50	1.50%	42	1.30%	-16.00
51-125	1,657	50.30%	1,742	53.20%	5.13
126-250	949	28.80%	924	28.20%	-2.63
251-500	399	12.10%	326	10.00%	-18.30
501-750	125	3.80%	129	3.90%	3.20
750+	113	3.40%	99	3.00%	-12.39
electric	3	0.10%	13	0.40%	333.33
Total	**3,296**	**100%**	**3,275**	**100%**	**-0.64**

Source: Central Bureau of Statistics

Registration Data 1-12/2009 vs 1-12/2010 by brands			
Brand	1-12/2009	1-12/2010	Change
SYM	7,239	6,506	-10.13
Kymco	5,338	4,354	-20.31
Yamaha	1,233	1,145	-7.14
Piaggio	825	1,071	29.82
Honda	916	659	-28.06
Suzuki	574	347	-39.55
Kawasaki	275	255	-7.27
KTM	165	231	40
BMW	141	129	-8.51
Husqvarna	54	38	-29.63
Ducati	40	54	35
Harley	39	36	-7.69
Others	899	233	-74.08
Total	**17,738**	**14,958**	**-15.67**

Source: Central Bureau of Statistics

DOING BUSINESS IN ISRAEL

The business environment in Israel for importers and distributors of two-wheeled motor vehicles is different than in Europe. Standards and driving license categories are identical, but import duties in Israel are excessively high, especially on motorcycles, which restricts growth and places a heavy financial burden on importers compelling them to finance display stocks for their dealers and pay import duties. Dealers do not purchase the motorcycles but receive them on consignment from the importer.

IMPORT DUTIES

There is no customs duty for motorcycles, including scooters, up to 125 cm³ and 11kW from the EU and the United States, but a purchase tax of 40% is levied, regardless of the origin. For vehicles over 125 cm³ and 11 kW, there is also no customs duty; the purchase tax amounts to 72%.

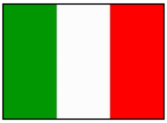
Moreover, importers have to set up bonded warehouses at their own expense, provide PDI (Pre Delivery Inspection) services and delivery systems to dealers and customers alike. According to Israeli law, importers are required to maintain a central service station, showroom and a central spare parts department. Importers must also sell vehicles and spare parts directly to customers- not only through dealers, as accepted in Europe. Importers are also required to supply spare parts for a period of 7 years from the date of sale of the scooter to the customer, and must supply the spare parts within 7 days in the case that a vehicle cannot run without the parts.

Establishing a national sales and service network and maintaining it, requires high sales volumes, which is why the two major dealers in Israel (combined 90% market share) have to market multiple brands. The Metro Group markets SYM, Yamaha and Kawasaki, and the Ofer Avnir Group markets Piaggio, Suzuki and Kymco. Boutique brands, such as Ducati and Harley Davidson do not maintain a national network of dealers as they only sell small numbers per year. There are a number of auto vehicle distributors that market two wheel vehicles through their existing network of vehicle dealerships and service stations. For example, Honda- KTM, Peugeot and Citroen–Polaris Orv's and BMW-Husqvarna.

OPPORTUNITIES FOR U.S. EXPORTERS

It is expected that a law on motor sports will be passed later this year, which will open the market to offroad motorcycles and ATVs. In general, there is also interest in electric scooters and motorcycles.

ITALY



Capital:	Rome
Population:	61 million
GDP:	$2.1 trillion
Currency:	Euro (EUR)
Language:	Italian

Contact:
U.S Commercial Service Milan
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Tel. +39-02-6268 8523
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SUMMARY

Italy is the largest European market for new motorcycles and mopeds, with almost 400,000 new registrations in 2010. Around 307,000 vehicles over 50cm^3 were sold (94,000 motorcycles and 213,000 scooters). Of the 89,000 under 50cm^3 mopeds that were sold, 88% were scooters.

Italy is also the leading manufacturer of motorized 2-wheel vehicles in Europe. Production in 2010 was 477,000, more than half of the European output. The country has the largest number of motorcycles on the road in Europe: 9.5 million vehicles in 2009 (3.3 million under 50cm^3 and 6.1 million over 50cm^3).

The Italian Government subsidized sales of motorbikes 2009 and 2010 as an effort to reduce pollution. Subsidies are expected to continue in 2011. Imports are significant: most come from the EU and Asia (especially Japan) Harley Davidson accounted for 7.6% of all imports (more than 7,000 bikes) in 2010.

There is also a significant market for used motorcycles: in 2010 around 583,000 vehicles changed ownership, a 2% increase compared with 2009.

Accessories are in high demand. As a rule, there are opportunities for manufacturers of high-quality/design items such as mechanical parts, body parts, helmets, goggles and apparel. (Italians bought around 780,000 helmets in 2010.)

Motorcycle tourism: Travelling by motorbike has a special appeal and many local tourist boards and travel agencies have created specific motorbike programs.

Safety devices: Domestic supplies dominate this segment (Dainese, Nolan, AGV). The EICMA 2011 trade show will devote a special area for companies that make motorbike riding safer, especially in terms of infrastructure, tools, and protective clothing.

Italians enjoy high-tech and high quality motorcycles and mopeds and U.S. companies that provide innovatively designed products, whether vehicles, accessories or apparel, can find interesting opportunities.

ITALY

Production			
Europe	1.000.000		
Italy	500.000	50%	

Turn Over		
Europe	32 billions	
Italy	9,6 billions	30%

Fleet		
Europe	34.000.000	
Italy	9.000.000	26%

Market		
Europe	1.600.000	
Italy	330.500	20%

EICMA

Gross Exhibit Area
250.000 sqm

Next Exhibit Area
49.466 sqm

Supporting Events MOTOLIVE (outdoor)
100.000 sqm

Trade Visitors
50.041
(19.048 coming from 127 foreign countries)

Total Visitors
500.000

Registered Journalists
1.631

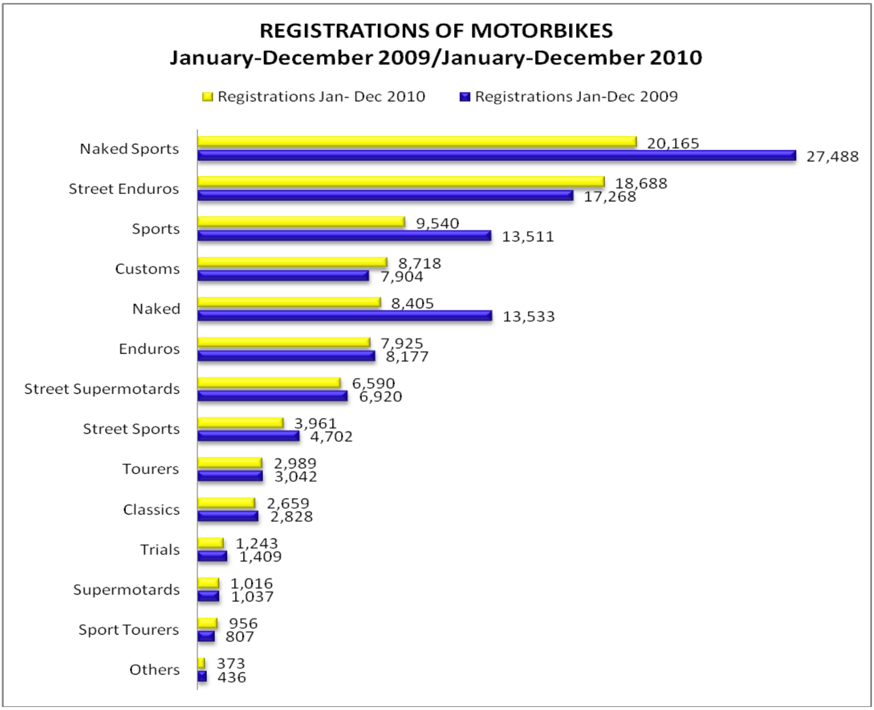
Eicma on Line Visitors during the Show
271.438

Seen pages during the Show
4.716.823

THE EICMA MILAN SHOW

is the largest annual Motorcycle show in the world

EICMA
Via Antonio da Recanate,1
20124 Milano - Italy Tel. +39.02.677351.1 Fax. +39 02 6698.2072
eicma@eicma.it - www.eicma.it



In 2010, the customizing segment played a leading role in the motorcycle market and increased by about 10.3% compared with 2009 (sales grew from 7,904 to 8,718 units). The customized segment accounts for 9.4% of sales registered and the most significant increase of all segments. Harley Davidson has about 65.5% of the customizing segment, and in 2010 increased its sales by 11.2% compared with 2009.

Motorcycle and moped producers are paying particular attention to green technologies. Italian drivers are high performance bikers and are looking for vehicles that are both green and fast.

The ‘Green’ Market

The various governments (national and local) and motorcycle/scooter/ moped companies are ever more sensitive to environmental issues. They promote different strategies aimed to create environmental respect awareness and study innovative technologies, which can help reducing the pollution.

In 2009 and 2010, the national government granted federal funds to push motorcycle/moped customers to buy less polluting vehicles, classified ‘EURO 3’ (and smaller than 400 cc/70kW), as well as electric and hybrid vehicles. The government announced that funds will be allotted again in 2011, but it is expected that the benefits granted by the private sector (discounts, financing) will be more important for end users.

The trend toward more ecologically friendly vehicles is confirmed by the exhibiting areas displaying green and hybrid vehicles at the Milan's EICMA show. Starting in 2009, EICMA, has been organizing "The Green Planet", an area where exhibitors display technologies and innovations related to environmental sustainability, zero emissions and clean mobility. EICMA wants to support those companies which have invested funds in this segment for years with the objective of promoting new technologies for vehicles, components and accessories. This first ecological initiative was so successful that "The Green Planet" area was organized again in 2010 (with 23 exhibitors displaying their products) - and will be present in the upcoming 2011 edition

TRADE EVENTS

The U.S. Department of Commerce-certified EICMA 2011, the major global motorcycle, scooter, moped and accessories trade show, takes place November 8-13, 2011, in Milan. See: www.buyusa.gov/italy/en/eicma2011.html.

Motor Bike Expo Show 2012, January 20-22, 2012, Verona, (special motorcycles, custom and accessories), www.motorbikeexpo.it/inglese/

Moto Dealernews Expo 2012, February 2012 (dates TBD), Milan (A B2B event for manufacturers, importers and dealers), www.motodealernewsexpo.it

Motodays 2012 (motorcycle / scooters / mopeds) March 8-11, 2012, Rome, www.motodays.it

EICMA 2012 (motorcycle / scooters / mopeds) November 13-18, 2012, Milan, www.eicma.it/en

RESOURCES & KEY CONTACTS

Associations
ACEM, the European Motorcycle Association, www.acem.eu, and www.acem.eu/media/d_Production_2011_12833.pdf.

ANCMA, the Italian Trade association of manufacturers of two- and three-wheeled vehicles and companies producing parts and accessories for these vehicles,
www.ancma.it/mondo_ancma_eng.asp,
www.ancma.it/common/file/articolo_223sezione_7.pdf,
www.ancma.it/it/publishing.asp and C&P Group (Moto Dealer News – Jan.-Feb. 2011), the dealers business magazine, www.motodealernews.it/

Media
Motociclismo, www.motociclismo.it
Dueruote, www.dueruote.it
Moto Dealer News, www.motodealernews.it

NETHERLANDS

Capital: The Hague
Population: 16.7 million
GDP: $677 billion
Currency: Euro (EUR)
Language: Dutch

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SUMMARY

There are more than 683,050 motorcycles registered in the Netherlands with an average annual mileage of 3,800 kilometers each. In 2010, 12,230 new and approximately 120,000 used motorcycles were sold. The largest market share had traditionally been held by Japanese brands, but BMW took over the lead position in 2010.

Dealer network: Motorcycles enter the Dutch market through importers of foreign brands. There are approximately 20 importers in the Netherlands, who supply to more than 400 dealers. Dealers either represent their own brand exclusively, (e.g. Harley-Davidson and BMW), or they are multi-brand dealers. Most dealers (approximately 60%) are independent entrepreneurs, who have the freedom to manage their own product lines and buy directly from importers.

Most motorcycle stores sell both used and new vehicles. Although for repair and maintenance, original parts are generally used. There has been a visible trend over the past years towards the use of high-quality, aftermarket parts. Sales of parts, helmets, accessories and apparel are the most important sources of income for dealers.

MOPEDS AND MOTORIZED BICYCLES

There are approximately 1,068,000 mopeds and motorized bicycles in the Netherlands. Electric mopeds and motorized bicycles are becoming increasingly popular. There were 2,000 of these electric vehicles in 2008 and 9,450 in 2010.

Retail: There are approximately 400 retail stores that sell mopeds and motorized bicycles. Although they were traditionally sold in bicycle stores, there is now a tendency to specialize in the sales of these vehicles. Within the mopeds and motorized bicycles dealer network, there is little brand specialization. Purchases are done through importers or specialized wholesalers.

TRENDS

Due to the strong price competition and the diminishing profit margins, experts expect this subsector to be subject to drastic reorganization in the near future. Experts are also concerned about an increase in products of questionable quality that are entering the market. These include motorcycles, mopeds, motorized bicycles and aftermarket products, such as parts and accessories.

STATISTICS

Motorcycle park	
2007	631,000
2008	650,000
2009	668,000
2010	683,000

New motorcycles sales				
	2010	**2009**	**2008**	**2007**
Total	12,230	14,304	**16,947**	**16,253**
Aprilia	383	318	637	444
Benelli	12	18	21	18
Beta	26	32	11	1
BMW	1,992	1,984	1,947	1,838
Buell	98	157	173	124
Cagiva	2	18	20	33

A more complete list is available from Natasha.keylard@trade.gov

Motorcycle park by age of owner	
Age	**%**
Total	**100.00**
18-21	1.00
22-25	3.90
26-35	15.30
36-45	27.80
46-55	32.20
56-65	15.60
>**65**	4.20

Moped & Motorized bicycle park by year built						
	2010	2009	2008	2007	<2007	Total
Total	**94,83**	**94,293**	**90,804**	**68,352**	**719,458**	**1,067,737**
Mopeds	33,611	40,424	44,428	36,237	414,335	**569,035**
Motorized bicycles	61,219	53,869	46,376	32,115	305,123	**498,702**

Used motorcycle sales					
	2010	2009	2008	2007	2006
Total	**116,421**	**122,192**	**121,811**	**123,154**	**109,39**
Through the following channels:					
Professional					
Motorcycle companies	39,181	41,040	43,061	45,822	46,356
Individual consumers	77,24	81,152	78,75	77,332	63,034

New moped sales by brand				
	2010	2009	2008	2007
AGM	648	628	71	27
Aprilia	884	1,353	1,703	1,76
Baotian	996	1,232	1,790	2,093
Beeline	206	71		-
Benzhou	251	470	513	438
Beta	218	391	416	404
BTM	128	43	13	0
Derbi	647	1,102	1,366	1,181
Fosti	573	566	592	82
New moped sales by brand				
	2010	**2009**	**2008**	**2007**
Generic	103	219	323	239
Gilera	301	438	603	677
Honda	115	134	178	206
Keeway	363	789	1,231	994
Kymco	4,546	5,323	6,263	4,803
Peugeot	2,75	3,641	5,551	4,58
Piaggio	3,818	4,38	3,261	2,987
Yamaha	2,977	4,402	4,3	3,702
Total 2-wheel	32,648	40,211	44,882	36,764
Aixham	288	342	499	588
JDM	75	109	136	241
Ligier	292	394	396	381
Microcar	382	579	383	346
Piaggio 3-/4-wheelers	83	45	86	94
Other 3-/4-wheelers	159	166	241	230
Total 3-/4-wheelers	1,469	1,795	1,929	2,070
Total general	**34,117**	**42,006**	**46,811**	**38,834**

New motorized bicycle sales by brand				
	2010	**2009**	**2008**	**2007**
AGM	2,514	2,066	121	25
Baotian	1,416	1,274	1,988	1,752
Fosti	3,406	3,235	2,587	284
Kymco	4,447	4,598	3,789	3,141
Peugeot	3,932	4,353	6,787	5,305
Piaggio	5,624	5,275	3,500	3,156
SYM	8,235	7,808	6,211	3,584
Vespa	6,856	5,729	4,529	2,475
Znen	4,323	3,444	1,671	219
Total 2-wheelers	61,841	55,556	48,483	33,913
Total general	**61,869**	**55,56**	**48,486**	**33,916**

BEST PROSPECTS

Parts for customizing motorbikes, protective clothing and helmets are the best sellers in the market.

TRADE EVENTS

Motorbeurs Utrecht, February 23-26, 2012, www.motorbeursutrecht.nl

RESOURCES & KEY CONTACTS

Association
RAI Vereniging (Vehicle Industry Association), www.raivereniging.nl

POLAND

Capital:	Warsaw
Population:	37 million
GDP:	$452 billion
Currency:	Polish Zloty (PLN)
Language:	Polish

Contact:
U.S Commercial Service Warsaw
Ms. Joanna Chomicka
Commercial Specialist
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Joanna.Chomicka@trade.gov
export.gov/poland

SUMMARY

According to the Polish Central Statistical Office (GUS) there were 974,906 motorcycles and 833,817 motorbikes registered in Poland at the end of 2009. These figures grew in 2010, but official statistics are not available yet.

Unlike in Western Europe, where the market for motorcycles is subject to cyclical economic fluctuations, the market in Poland is still at the developing stage. Since the Polish market is relatively small, it is fully independent from the trends observed in the passenger car market.

One typical motorcycle purchaser is a man, 35-45 years old, quite well-off, already owns a car, a house or an apartment and wants to fulfill some of his less immediate needs. There is also another type of client, one not so well-off, who buys inexpensive models of smaller capacity, usually scooters.

The sales of the least expensive models (priced PLN 2,500-3,500) are growing quite substantially. As previously stated, the Polish market does not copy the trends and patterns of Western Europe. The most popular motorbikes sold in Poland are the standard or general street motorcycles called naked scooters, and the enduro or off-road/racing cycles. Sport models enjoy smaller interest. Cruisers and choppers are much less in demand. Customers also show interest in small capacity motorbikes, for which a special driving license is not required.

In the years 2000-2006 the number of two-wheeled vehicles (motorcycles, motorbikes and scooters) registered annually in Poland reached 87,000 units. In 2007, this figure grew to 157,713 and to 219,394 in 2008. The economic crisis in 2009 affected, sales as well as the number of first-time registrations. Sales dropped by nearly 37%, while the drop in sales of small capacity engines (up to 50 cm^3), decreased nearly 50%. First registration figures dropped significantly in 2009 and 2010. The beginning of 2011 saw the start of a recovery with increasing sales, mostly of used vehicles.

Poland has had a long history of motorcycle production. Before World War II, nearly 20 Polish firms engaged in the production of motorcycles. After the war, several producers of motorcycles and motorbikes remained active in Poland, until 1989, when almost the entire industry shut down.

FIRST REGISTRATIONS OF TWO-WHEELED VEHICLES

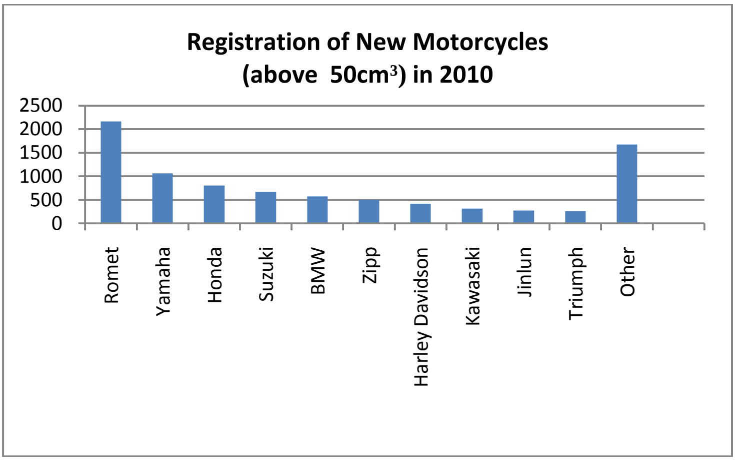
	2007	2008	2009	2010	2011 (I-V)
Motorcycles	42,215	59,797	49,666	47,008	24,937
Of which new motorcycles	7,574	10,696	8,934	8,726	4,328
Motorbikes	115,498	159,597	113,605	87,578	39,974
Of which new motorbikes	91,913	135,994	94,557	72,196	30,268
Total	**157,713**	**219,394**	**163,271**	**134,586**	**64,911**

Source: Polish Association of Automotive Industry www.pzpm.org.pl

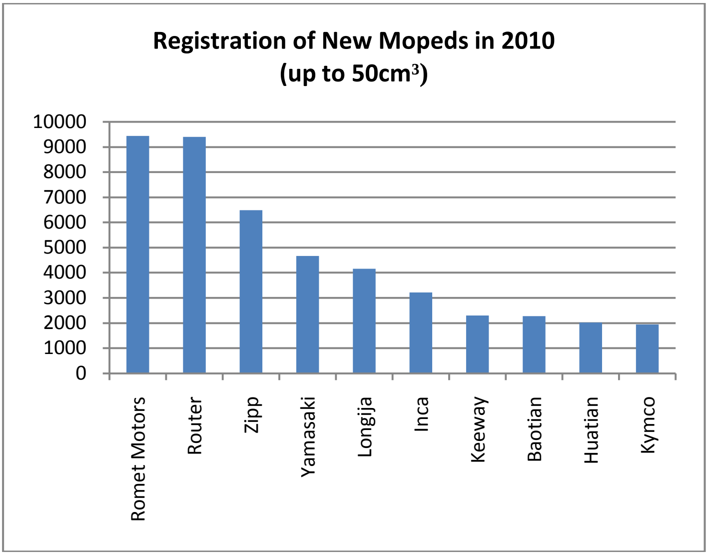
Over 80% of motorcycles first registered in Poland are imported used motorcycles. New motorcycles are much more expensive in Poland than in the United States or Western Europe. This creates a substantial market for used machines in good technical condition. There are companies in Poland specializing in importing motorcycles (new and used).

The charts below represent the leading suppliers of motorcycles and motorbikes and their market shares. Until 2009, Yamaha used to be the leader in motorcycle sales, followed by Honda, Suzuki, Kawasaki, and BMW. Recently a Polish firm started to offer inexpensive motorcycles under its own name “Romet”. Some of their models are made in China. The company soon became the leader in motorcycles sales in Poland. Another Polish firm, Almot, offers a motorcycle under the name Junak. During the 1950s and 60s, the original Polish-made Junak had reached cult status in Poland.

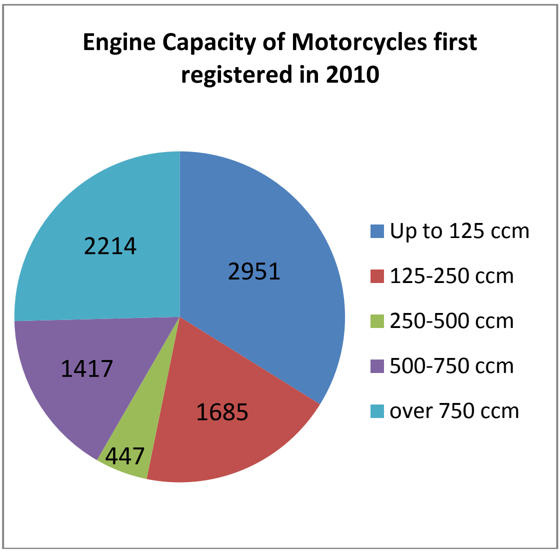
Today’s models are produced in China. Sales of “Junaks” have been increasing, and in May 2011 Junak was number three on the list of bestselling brands. Generally, imports from China are growing, as the inexpensive, small capacity engine models are in high demand.



Source: Polish Association of Automotive Industry www.pzpm.org.pl



Source: Polish Association of Automotive Industry [*www.pzpm.org.pl*](http://www.pzpm.org.pl)



Source: Polish Association of Automotive Industry [*www.pzpm.org.pl*](http://www.pzpm.org.pl)

SALES OF MOPEDS AND MOTORCYCLES BY SEGMENTS – PERCENTAGE OF EACH SEGMENT

	2007	2008	2009
Motorcycles	82.2	81.04	47.68
Big Scooter	1.95	2.22	5.3
Chopper & Cruiser	3.09	2.17	5.63
Street	3.85	5.27	15.56
Tourist	2.71	3.14	5.3
On/Off Road	2.62	2.67	8.11
Sport	0.52	0.65	0.5
Super Sport	2.25	1.82	5.13
Off Road	0.8	1.02	6.79
Total Mopeds	17.8	18.96	52.32
Total	**100**	**100**	**100**

Source: Polish Association of Automotive Industry www.pzpm.org.pl

BEST PROSPECTS

Parts for customizing motorbikes, protective clothing and helmets are the most promising segments. Motorbike enthusiasts request the highest quality parts and accessories, which provides good opportunities for American exporters. Harley Davidson is undoubtedly the leader of the custom segment. In the first half of 2011 the segment of parts, helmets and accessories of the market grew visibly (double digit pace).

TRADE EVENTS

Motorcycle and Scooter Expo March 2-4, 2012, Warsaw, www.wystawamotocykli.pl

Fair of Motorcycles, Scooters, Quads MSQ-EXPO 26-28 April, 2012, Kielce
www.targikielce.pl/index.html?k=msqexpo_en&s=index

RESOURCES & KEY CONTACTS

Associations
Polish Association of Automotive Industry, www.pzpm.org.pl

Polish Chamber of Automotive Industry, www.pim.pl

SLOVAK REPUBLIC

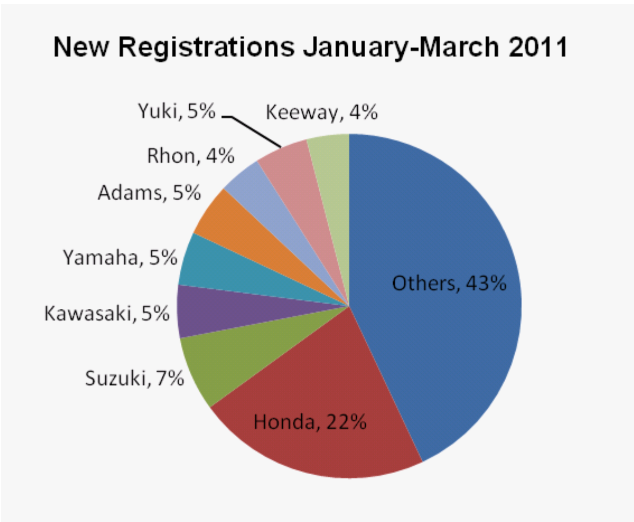
Capital: Bratislava
Population: 5.43 million
GDP: $78 billion
Currency: Euro (EUR)
Language: Slovakian

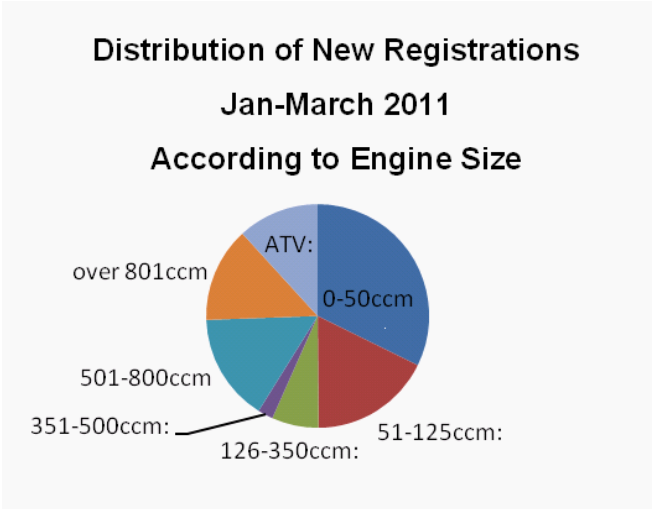
Contact:
U.S Commercial Service Bratislava:
Ms. Lucia Maskova
Commercial Specialist
Tel. + 421-2-5920 5317
Fax: +421-2-59205333
Lucia.Maskova@trade.gov
export.gov.slovakia

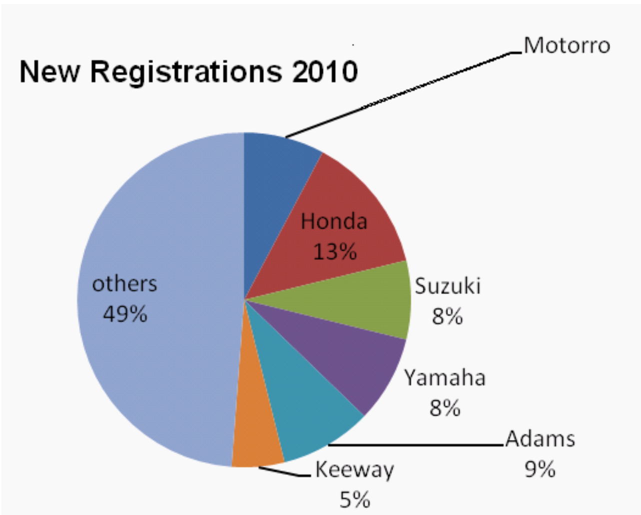
SUMMARY

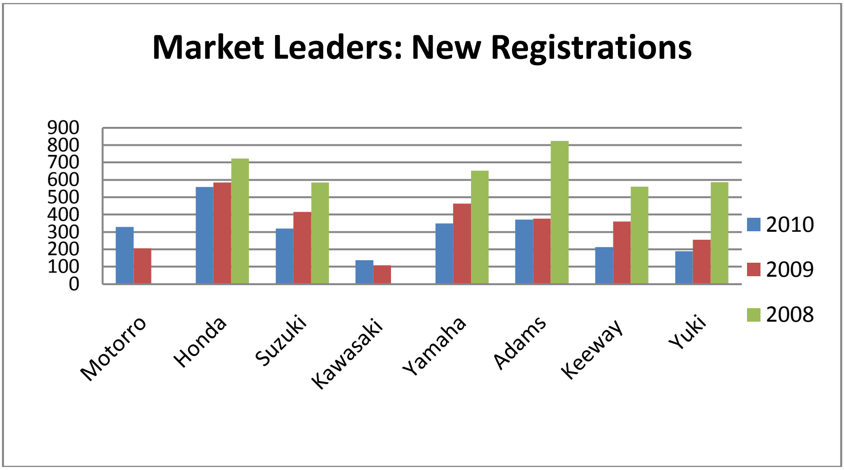
In 2010, there were 92,006 motorbikes registered in the Slovak Republic, of which 4,187 were new registrations. The vast majority (43.8%) of registered motorbikes and scooters are vehicles of 50 cubic centimeters, followed by motorbikes and scooters with engines up to 125 cm³ (14.4%).

There is no domestic motorbike production. The top three market players are: Honda 13.4%, Yamaha 8.4% and Adams 8.9%. The other big players are Motorro, Suzuki and Keeway. Another 26 motorbike brands share less than five percent of the market.
Even though motorcycle registration is obligatory according to Slovak law, unregistered ORSs and ATVs are driven at competitions or in the countryside.




Distribution of New Registrations
Jan-March 2011
According to Engine Size
ATV:
over 801ccm
0-50ccm
501-800ccm
351-500ccm:
126-350ccm:
51-125ccm:


New Registrations 2010
Motorro
Honda 13%
others 49%
Suzuki 8%
Yamaha 8%
Adams 9%
Keeway 5%



Source: Automotive Industry Association of the Slovak Republic

MAIN COMPETITORS

Basically all major multinational players are supplying to the Slovak market. Motorcycle accessory suppliers: OTW, D.I.E., Thor, Held, Sade, Shot, Arai, Airoh, Lazer, Giali, Evs, Buse, Acerbis, AGV, Diadora, Forma, FOX, HJC, Icon, Monster and others.

TRADE EVENTS

Motocykel, March 15 -18, 2012, Bratislava,
www.incheba.sk/exhibitions/Motorcycles_2012/3772

RESOURCES & KEY CONTACTS

Associations
Automotive Industry Association of the Slovak Republic, www.zapsr.sk

Slovak Motorcycling Federation (SMF), www.smf.sk


+ INTERNATIONAL
FREIGHT FORWARDER +
+ SHIPPING AGENT +
+ AIRFREIGHT +
+ CUSTOM BROKER +
+ LOGISTICS +
+ TRANSPORTS +
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N
W
E
S
King Ocean Lines

SPAIN

Capital:	Madrid
Population:	45 million
GDP:	$1.4 trillion (2010)
Currency:	Euro (EUR)
Language:	Spanish

Contact:
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Fax: +34-91-5630859
Carlos.Perezminguez @trade.gov
export.gov/Spain

SUMMARY

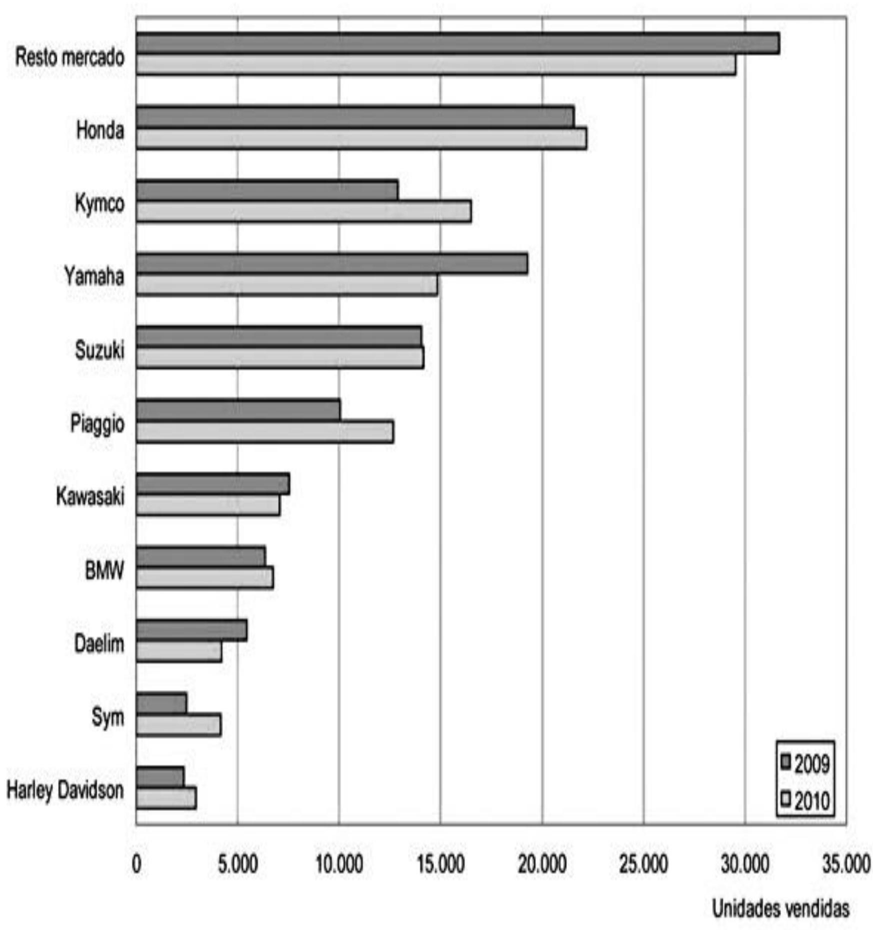
Spain's motorcycle industry has a long tradition, dating back to the production of the first brand ¨Villalbi¨in 1903. Since then, Spain has continued to produce important motorcycle brands, including Sangals, Derbi, Montesa, Ossa, Bultaco and MV Augusta. Spain currently has 15 different motorcycle production plants. Overall, the sector is comprised of approximately 200 companies dedicated to the production and/or distribution of motorcylces and mopeds.

As a result, Spain produces around 270 different sector brands. These companies employ approximately 2,300 workers directly and indirectly support the employment of about 23,000 workers. 82.5% of motorcycle production is concentrated in the region Cataluña, with 12 production companies and a turnover of 1 billion Euros in 2010. ANESDOR is the largest interest group representative for the sector, representing 31 companies and approximately 97% of the market.

Spain is the third largest European market and the second largest European producer in the sector. However, the motorcycle industry in Spain is invariably affected by the current recession and has struggled for several years against market decline. Nonetheless, in medium- to long-term prospects the market continues to prove promising, as Spaniards have increasingly turned to motorbikes as a solution for navigating increased urban traffic congestion. It is also attractive as an energy efficient mode of transport, imparting lower overall costs both to the environment, as well as to the owner. In fact, in 2010 over 70% of electric vehicles sold in Spain were motorcycles and mopeds.

MARKET DATA:

In 2010, the sector experienced a third consecutive year of decline, dropping to levels not seen since 1994. The overall sales of new motorcyles fell 4.7% in relation to 2009, with 135,144 motorcycles sold. Honda took the lead with over 16% of the overall market, with Kymco second at 12.23%. The top ten brands sold were:



In comparison, the moped market experienced a much greater decrease in market sales. With a total of 34,187 registrations it dropped to 1962 sales levels, experiencing a fall of 22.2% compared to 2010.

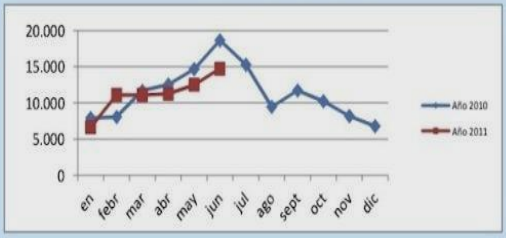
The recent increase in the minimun age for driving mopeds from 14-15 years, effective since September 2010, is conjectured to be a contributing factor to this drop. In 2011's first trimester, 25,131 motorcycles and mopeds were sold, a 9% drop in comparison to the same period in 2010. ANESDOR has conjectured that this drop is related to increased credit restrictions and the overall impact of the economic crisis.

Detailed data for the 2011 market can be found in the tables below.
The graph below shows Market Overview figures for June 2011.
Left Column: June 2011, *Right Column*: January to June 2011.
Top Graph: Motorcycle Market (line 1: off-road bikes, line 2: road bikes, line 3: scooters > 50cc.) *Bottom Graph*: Moped Market (line 1: automatic, line 2: manual, line 3: scooters of 50cc.)

RESUMEN DE MERCADO JUNIO 2011

Mercado de Motocicletas

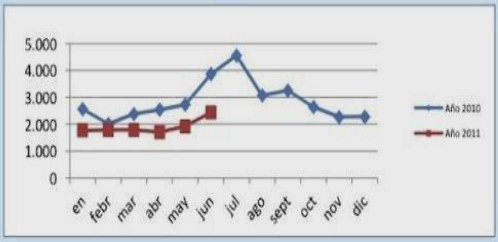
Arpem.com



MOTOCICLETAS	Junio 2011				Enero-Junio 2011			
Segmento	Uds. 2011	I.P.M.	% s/2010	Uds. 2010	Uds. 2011	I.P.M.	% s/2010	Uds. 2010
Campo	1.311	8,90%	-27,41%	1.806	7.175	11,28%	-18,21%	8.772
Carretera	3.884	26,37%	-33,55%	5.845	17.947	28,21%	-26,92%	24.559
Scooter > 50	9.534	64,73%	-13,40%	11.009	38.489	60,51%	-4,17%	40.163
Totales	**14.729**	**100%**	**-21,07%**	**18.660**	**63.611**	**100%**	**-13,45%**	**73.494**

Mercado de Ciclomotores

Arpem.com



CICLOMOTORES	Junio 2011				Enero-Junio 2011			
Segmento	Uds. 2011	I.P.M.	% s/2010	Uds. 2010	Uds. 2011	I.P.M.	% s/2010	Uds. 2010
Automático	102	4,19%	-44,57%	184	521	4,73%	-21,77%	666
Cambio	254	10,43%	-49,70%	505	1.149	10,43%	-42,72%	2.006
Scooter 50	2.079	85,38%	-34,56%	3.177	9.348	84,84%	-30,40%	13.431
Totales	**2.435**	**100%**	**-37,02%**	**3.866**	**11.018**	**100%**	**-31,58%**	**16.103**

Source: www.arpem.com

The table below shows Registration data based on Cylinder Size.
Left Column: June 2011, *Right Column*: January to June 2011.
Top: Mopeds, *Bottom*: Motorcycles.

Arpem.com

MATRICULACIONES POR TRAMO DE CILINDRADA

CICLOMOTORES								
	Junio 2011				Enero-Junio 2011			
Tramos cilindrada	Matricul.	% / total	Matr. aa.	% ^ aa.	Matricul.	% / total	Matr. aa.	% ^ aa.
0-50	2.435	100,00%	3.866	-37,02%	11.018	100,00%	16.103	-31,58%
Ciclomotores	**2.435**	**100%**	**3.866**	**-37,02%**	**11.018**	**100%**	**16.103**	**-31,58%**

MOTOCICLETAS								
	Junio 2011				Enero-Junio 2011			
Tramos cilindrada	Matricul.	% / total	Matr. aa.	% ^ aa.	Matricul.	% / total	Matr. aa.	% ^ aa.
0-125	9.133	62,01%	10.020	-8,85%	36.527	57,42%	37.002	-1,28%
126-500	2.254	15,30%	3.194	-29,43%	10.714	16,84%	13.905	-22,95%
501-750	1.535	10,42%	2.813	-45,43%	7.724	12,14%	12.371	-37,56%
751-1000	1.056	7,17%	1.539	-31,38%	5.067	7,97%	6.025	-15,90%
> 1000	751	5,10%	1.094	-31,35%	3.579	5,63%	4.191	-14,60%
Motocicletas	**14.729**	**100%**	**18.660**	**-21,07%**	**63.611**	**100%**	**73.494**	**-13,45%**

Source: www.arpem.com

The table below shows the ranking of motorcycle brands sold January to June 2011.

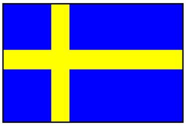
Arpem.com	Enero-Junio 2011				
Marca	Uds. 2011	Ranking	I.P.M.	Uds. 2010	% s/ 2010
Piaggio	2.895	1	26,28%	4.445	-34,87%
Yamaha	1.634	2	14,83%	2.519	-35,13%
Peugeot	1.446	3	13,12%	1.830	-20,98%
Derbi	942	4	8,55%	1.432	-34,22%
Kymco	895	5	8,12%	1.263	-29,14%
Aprilia	464	6	4,21%	632	-26,58%
Sym	303	7	2,75%	405	-25,19%
Rieju	277	8	2,51%	540	-48,70%
Keeway	248	9	2,25%	251	-1,20%
Daelim	194	10	1,76%	291	-33,33%
Beta	163	11	1,48%	296	-44,93%
Samada	104	12	0,94%	92	13,04%
Gilera	100	13	0,91%	165	-39,39%
DH Haotian	99	14	0,90%	119	-16,81%
TGB	99	15	0,90%	113	-12,39%
MH Motorcycles	81	16	0,74%	99	-18,18%
Jonway	60	17	0,54%	61	-1,64%
Motogac	59	18	0,54%	96	-38,54%
Baotian	55	20	0,50%	69	-20,29%
Honda	53	21	0,48%	40	32,50%
Emo	34	24	0,31%	0	#+INF
Puch	33	27	0,30%	55	-40,00%
Znen	27	32	0,25%	14	92,86%
HM	25	33	0,23%	21	19,05%
Generic	18	40	0,16%	44	-59,09%
Otras Marcas	710		6,51%	1.211	-41,37%
Totales	**11.018**		**100%**	**16.103**	**-31,58%**

Source: www.arpem.com

ADDITIONAL INFORMATION/RESOURCES:

Associations:
Asociación Nacional de Empresas del Sector de Dos Ruedas -- http://www.anesdor.com
Asociación Española de Fabricantes de Automóviles y Camiones – http://www.anfac.com
Asociación Mutua Motera – http://www.mutuamotera.org
Press:
Motociclismo -- http://www.motociclismo.es
SoyMotero -- http://www.soymotero.net

SWEDEN



Capital:	Stockholm
Population:	9.4 million
GDP:	$473 billion
Currency:	Swedish Krona (SEK)
Language:	Swedish

Contact:
U.S Commercial Service Stockholm
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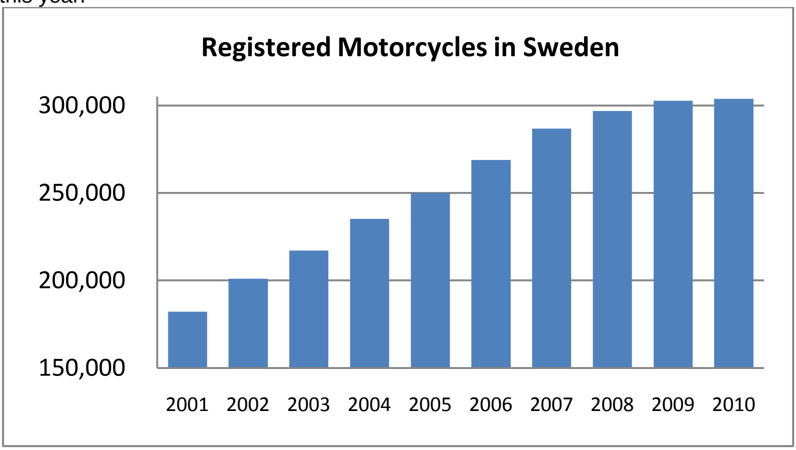
Hakan.Vidal@trade.gov
export.gov/Sweden

SUMMARY

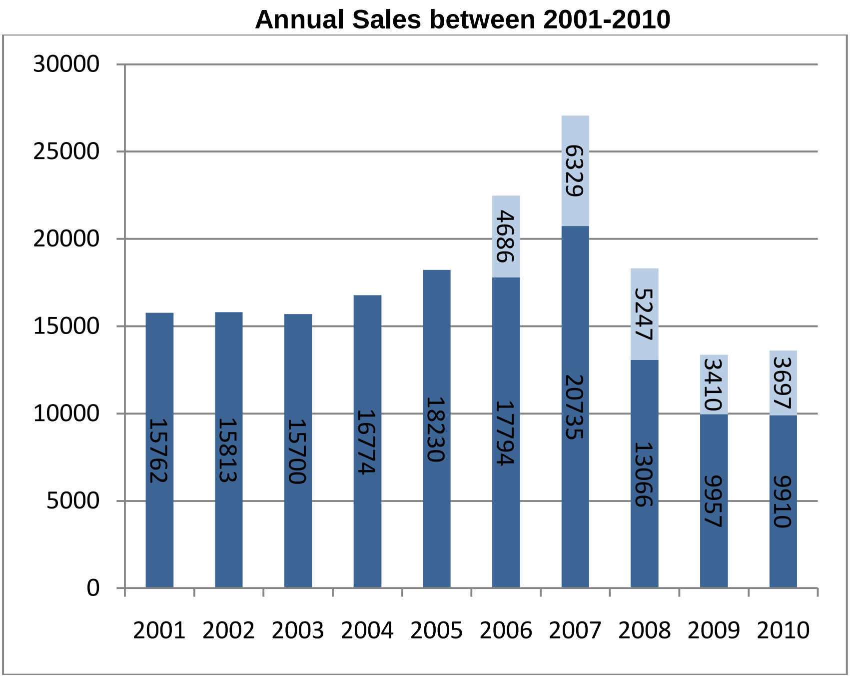
The Swedish motorcycle market is growing steadily. Just in the last 10 years the number of motorcycles in Sweden has doubled. American motorcycles have a significant market and, with the Swedish economy stabilizing, there is great potential for U.S. motorbike manufacturers.

THE SWEDISH MOTORCYCLE MARKET

The Swedish MC market is valued at $1.1 billion a year. Three million people or 30% of the Swedish population, have drivers licenses for motorcycles. Every year, for the past 10 years, around 10,000-12,000 new driver's licenses were issued. Since 2000, the number of motorcycles has increased from around 180,000 to over 300,000. The growth has been slowed down due to the recent economic recession, but analysts predict sales to increase this year.



The following chart indicates how many new motorcycles have been registered annually since 2001. Dark blue represents the number of two-wheeled motorcycles and light blue the number of quad motorcycles. In 2006, it became legal to drive quads on public roads. The necessary driving license is the same as for a motorcycle.

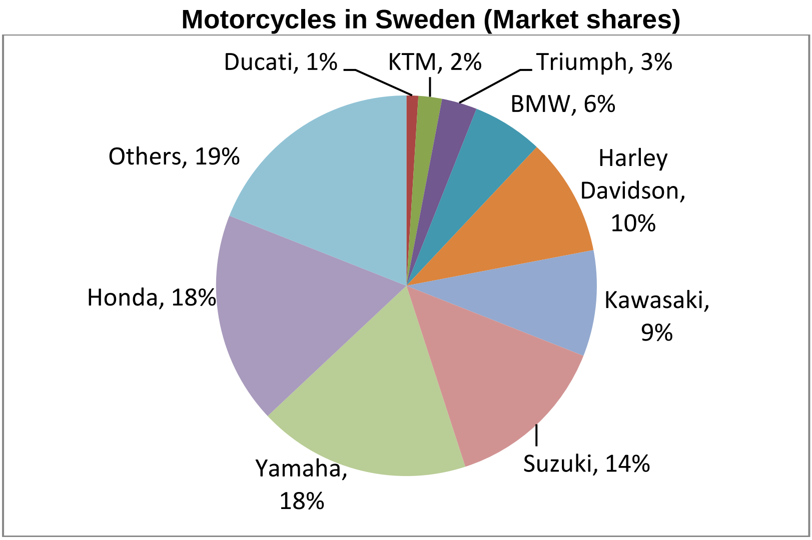


Japanese brands are market leaders. Yamaha and Honda each have an 18% market share. Suzuki follows with a 14% share and Harley-Davidson has an impressive 10% of the market.

SWEDISH IMPORTS

There are no domestic manufacturers of motorcycles in Sweden. In 2010, Sweden imported $118 million worth of motorcycles and parts from different parts of the world (the value has dropped significantly since 2008 when it was $185 million). During the last three years, Germany has been the largest exporter to Sweden ($29 million in 2010) followed by the United States ($22 million) and Japan ($13 million).

Harley-Davidson has enjoyed success in Sweden for a long time. In the last 10 years more H-D motorcycles have been sold per capita in Sweden than in any other country in the world. In 2010, Harley-Davidson sold motorcycles worth $22 million and spare parts and accessories worth $4.3 million in Sweden. American cars and motorcycles have a good reputation and with recent TV programs about motorcycle manufactures in the United States, the interest has increased. Other U.S. motorcycle manufacturers that have found buyers in Sweden are Victory, Saxon and Boss Hoss.



BEST PROSPECTS

There is a great demand for premium brand motor cycles such as Harley-Davidson and BMW in Sweden. Swedes see their vehicles as recreational bikes, hence the demand for premium quality rather than budget types of motorcycles.

Swedish motorcycle owners take owning, riding and caring for their motorcycles seriously. In the winter months, the bikes are stored and maintained in garages. In the summer, it is rare to see a motor cyclist without proper motorcycle gloves, boots, jacket and pants. Riding a motorcycle without a helmet is illegal.

All of this creates a demand for accessories, safety equipment and motorcycle apparel. Competition-style motocross and endurance motorcycles are often privately imported from the United States, which presents an export opportunity for U.S. motocross and endurance manufacturers.

TRADE EVENTS

On Two Wheels (På Två Hjul) January 26-29, 2012, Gothenburg, www.patvahjul.se

RESOURCES & KEY CONTACTS

Associations
SMC, The Swedish Motorcyclists Association www.svmc.se
SMR, The Swedish Motorcycle Dealers Association www.smr.se
McRf, Swedish distributors of mopeds, motorcycles and accessories, www.mcrf.se

TURKEY

Capital: Ankara
Population: 73.7 million
GDP: $863 billion
Currency: Turkish Lira (TL)
Language: Turkish

Contact:
U.S Commercial Service Izmir
Ms. Berrin Ertürk
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Tel. +90-232-441 2446
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Berrin.Erturk@trade.gov
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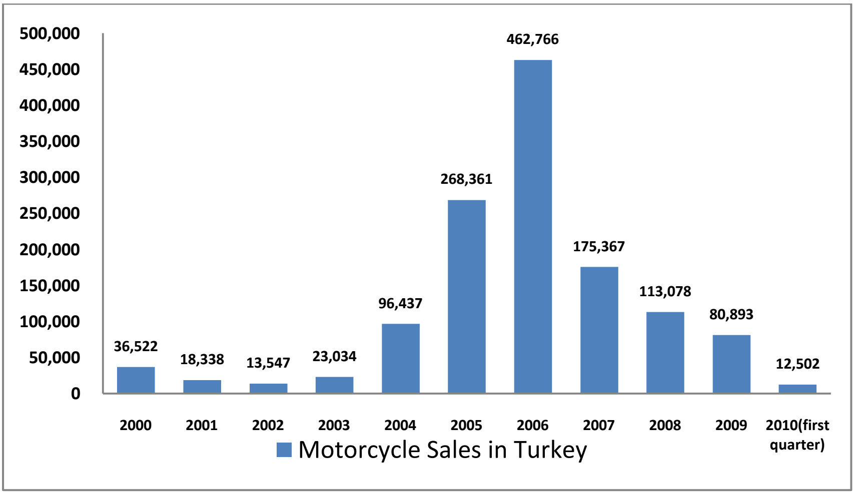
SUMMARY

The total motorcycle parts and accessories market was around $220 million in 2010 and both high-end and low-end products seem to be in good demand. More than 63% of demand is met by imports. There are a few domestic manufacturers that produce under license of foreign brands; imports are dominated by Chinese products. U.S. motorcycle imports account for 2.6% of the market and mainly consist of motorcycles with engines exceeding 800 cm^3 and chassis, saddles & seats and racks for luggage.

U.S. suppliers are strongly encouraged to work with a local distributor to both overcome the lengthy procedures of importation of motorcycles, and also get their products known in the local market.



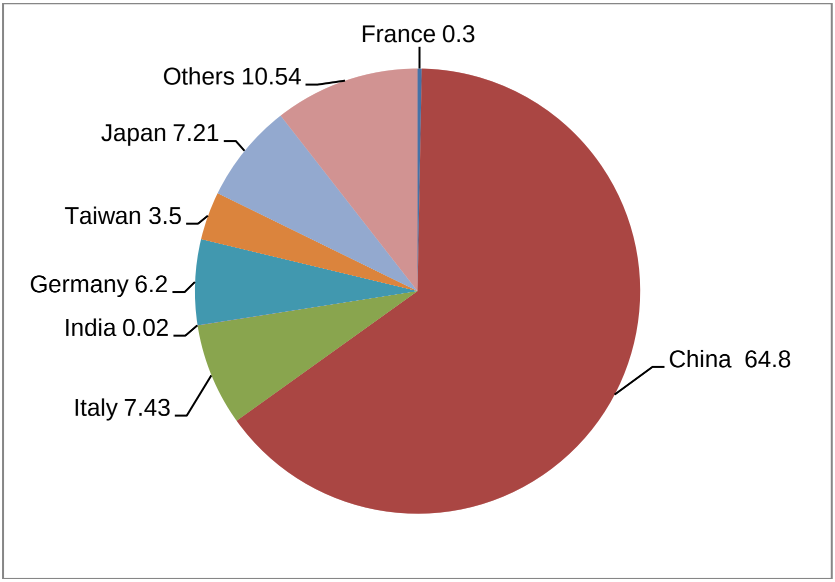
Source: TUIK & OSD

As seen from the above table, sales of motorcycles boomed in 2006. The government of Turkey wanted to take advantage of this booming market and increased the special Consumption Tax on motorcycle sales from 8% to 22% for motorcycles with an engine size of 250 cm^3 and less and 37% for the motorcycles above 250cm^3 in 2006. However, this tax increase resulted in a dramatic decrease of registrations the following year (only 175,000 bikes). In 2008, the market was also hit by the global economic crisis reducing the market even more (133,000 in 2008 and 81,000 in 2009). The government decreased the Special Consumption Tax from 22% to 11% for motorcycles with an engine size below 250 cm^3 and from 37% to 32% for those above 250 cm^3.

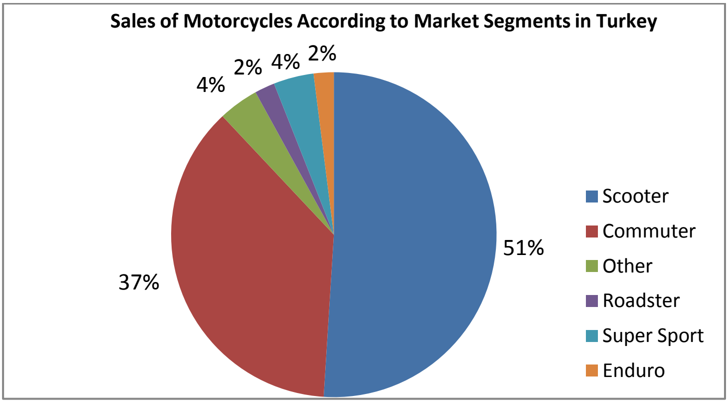
Even though the tax decrease helped the industry to reduce inventory, it did not raise sales to expected levels. Italy is the country with the most motorcycles per 1,000 people in Europe (181), whereas Turkey has only 20 per 1,000 people. Currently, the number of motorcycles in Turkey is estimated to be around 2.3 million.

In 2004, there were 10 internationally known brands present in Turkey. The additional imports from China have increased the number of brands to 220. However, these brands are not taking market share away from other internationally known brands, but have increased the size of the market by supplying cheaper products.

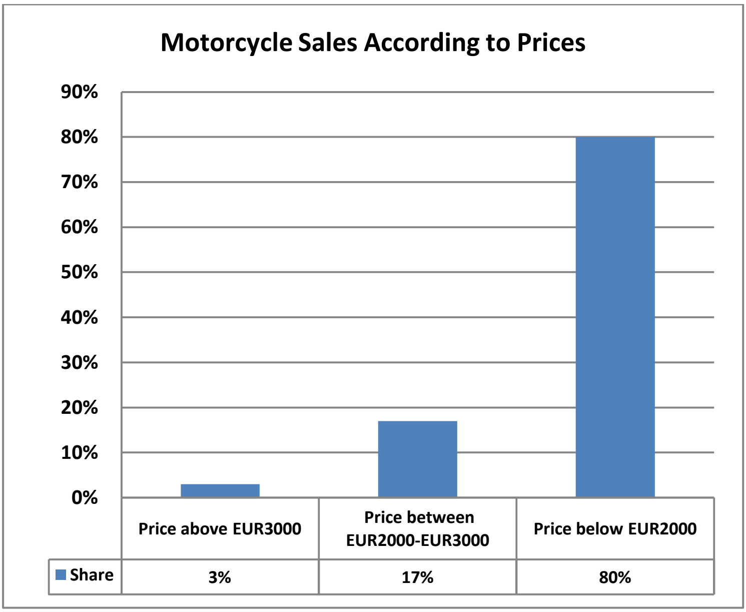
Major suppliers of two-wheeled vehicles according to TUIK figures are provided in the chart below:



Source: TUIK

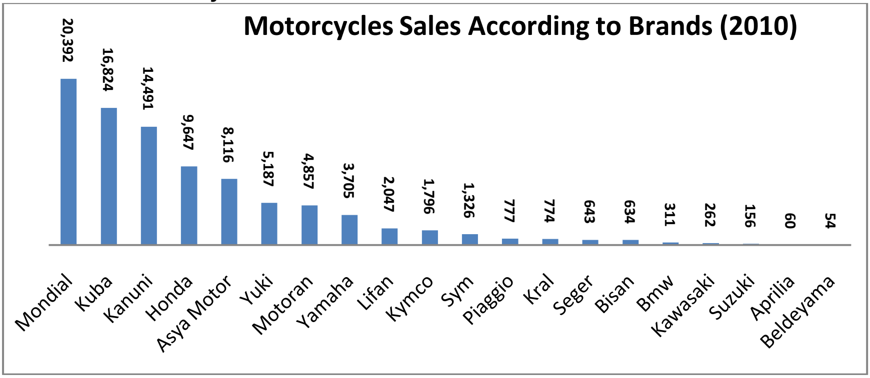


Source: Motorcycle Industry Association (MOTED)

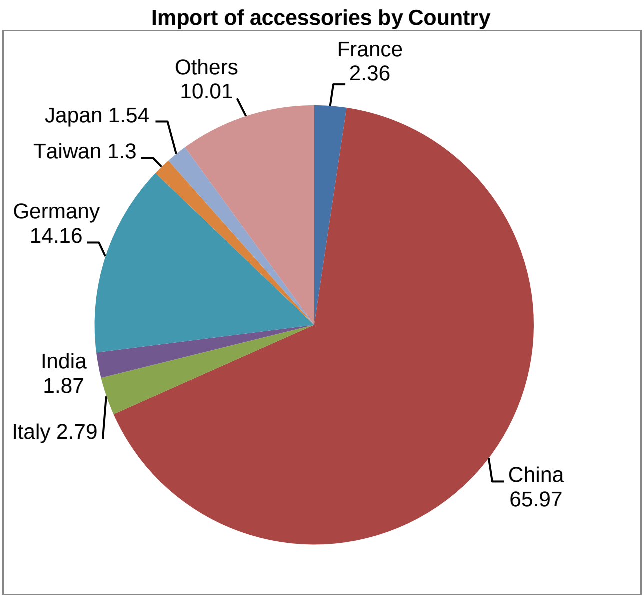


Source: Motorcycle Industry Association (MOTED)

Brands sold in Turkey:



Source: TUIK



Source: TUIK

The motorcycle accessory by country of origin: China is the primary supplier both for motorcycles (65%) and for motorcycle accessories (66%). While Italy is the second largest supplier (7.4%) of motorcycles, its share in accessories is rather low (3%). Even though Germany has a small share (6%) in motorcycles imports, it is the second largest accessories supplier of accessories with 14%.

Major imported accessories include bulbs, frames, tires, wheels, and forks. Helmets are among the top accessories imported into Turkey. The most popular brands are: Agv, Airoh, Arai, Bell, Caberg, Dainese, Hjc, Icon, Kbc, Lazer, Nolan, Reevu, Safebet, Schuberth, Shark, Shoei, Suomy, and X-lite.

BEST PROSPECTS

- High end motorcycles – above 800 cm³
- Low end motorcycles or scooters for commercial use (deliveries). More than 50% of the motorcycles imported are with engine sizes below 250 cm³.
- Parts for such motorcycles and accessories for motorcycles, including clothing, gloves, helmets, etc. are among other best prospects

TRADE EVENTS

Eurasia Moto Bike Expo 2012, March 1-4, 2012, Istanbul, www.motoplus.org

RESOURCES & KEY CONTACTS

Associations
MOTED- Motorsiklet Endustrisi Dernegi (Motorcycle Industry Association), www.moted.net
MOTODER- Motorsiklet Sanayicileri Dernegi (Motorcycles Industrialists Association), www.motoder.org
Turkiye Motorsiklet Federasyonu (Turkish Motorcycles Federation), www.tmf.org.tr

UNITED KINGDOM

Capital: London
Population: 62.3 million
GDP: $2.2 trillion
Currency: Pound Sterling (GBP)
Language: English

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SUMMARY

In the UK there are approximately 1.36 million registered motorcycles. The value of the UK market for motorcycles, mopeds and scooters was estimated at $755 million in 2010 and is forecast to increase 12%, to $846 million, by 2015. This growth is the result of UK motorists who, much like drivers in other countries, are increasingly turning to powered two-wheelers as a way to ease fuel costs, road congestion and CO2 emissions. Higher global emission standards will require motorcycle redesigns and is expected to trigger the demand for newer, more economical engines.

MARKET DEMAND

Imports dominate the UK motorcycles, mopeds and scooters market. Triumph is the only major domestic manufacturer, accounting for nearly 95% of total domestic production. Other domestic manufacturers include Norton and Royal Enfield, while several small companies assemble machines using imported engines and parts. The leading motorcycles suppliers to the UK are Japanese producers Honda, Suzuki, and Yamaha. BMW has a strong presence with its adventure sports and touring motorcycles. Italian company Piaggio is one of the leading suppliers of mopeds and scooters, while Chinese manufacturer Baotian held the top spot for the UK's best-selling scooter in 2010.

ANNUAL MOTORCYCLE AND MOPED REGISTRATION

MOTORCYCLES	2007	% Chg.	2008	% Chg.	2009	% Chg.	2010
0 - 100cm^3	2,738	-23.8	2085	-60.9	815	-37.2	512
101 - 125cm^3	39,224	-1.9	38,461	-23.5	29,404	-5.9	27,670
126 - 500cm^3	10,245	-1	10,140	-28.4	7,263	-19	5,886
501 - 700cm^3	23,012	-9.8	20,757	-8	19,090	-28	13,751
701 - 900cm^3	8,012	11.5	8,932	-5.8	8,416	-14.8	7,172
Over 900cm^3	36,735	-6.8	34,250	-12.6	29,941	-11.8	26,404
Total Motorcycles	119,966	-4.5	114,625	-17.2	94,929	-14.3	81,395
Total Mopeds	24,599	2	25,089	-33.9	16,581	-12.4	14,527
Total PTW	144,565	-3.4	139,714	-20.2	111,510	-14	95,922

ANNUAL NEW MOTORCYCLE REGISTRATIONS BY STYLE

	2007	% Chg.	2008	% Chg.	2009	% Chg.	2010
Scooters	22,477	0.6	22,611	-25.5	16,854	-6.3	15,791
Trail/Enduro	8,718	-14.7	7,434	-25.8	5,516	-12.2	4,841
Naked	21,928	-2.2	21,453	-0.7	21,299	-16.3	17,831
Sport/Touring	11,021	-8.4	10,091	-17.4	8,338	-9.8	7,517
Supersport	25,884	-9.3	23,480	-19.2	18,961	-24.8	14,258
Touring	3,856	9	4,202	-12.8	3,663	-11.4	3,244
Custom	12,360	-10	11,121	-16.4	9,296	-10.7	8,305
Adventure	12,224	7.7	13,169	-20.9	10,418	-12.2	9,151
Unspecified	1,498	-29	1,064	-45.1	584	-21.7	457
Total Motorcycles	119,966	-4.5	114,625	-17.2	94,929	-14.3	81,395

BEST PROSPECTS

Opportunities for U.S. companies exist in alternative powered two wheelers (e-PTWs). The sector for electric powered two wheelers is expanding rapidly, driven by a genuine enthusiasm for a greener, low emission transport alternative.

MARKET ISSUES AND OBSTACLES

The End of Life Vehicles Directive (2000/53/EC), which came into effect in January 2007, requires vehicle manufacturers to meet all or a significant part of the cost of processing end-of-life vehicles of their brand(s) - www.environment-agency.gov.uk/business/regulation/31887.aspx

European Whole Vehicle Type Approval for motorcycles. Directive 2002/24/EC (consolidated to 2005/30/EC) requires that all motorcycles, mopeds and scooters be approved to a selection of separate technical Directives in respect of various systems and components, and then approved in complete form as a whole vehicle. This will allow the registration of an approved vehicle in all EU Member States. The Framework Directive covers 2, 3 and some light 4 wheeled vehicles. The following link explains this in more detail: www.vca.gov.uk/additional/files/vehicle-type-approval/vehicle-type-approval-formotorcycles/vca039.pdf

Value Added Tax is currently 20%. Duty rates vary depending on cylinder size and can be found on the Business Link website: http://online.businesslink.gov.uk/bdotg/action/tariffFilter?export=false&key.commodityCode=8711&r.s=a&simulationDate=25/7/11

MARKET ENTRY

The most common way to enter the UK market is to establish a relationship with a local distributor or authorized representative. Due to the existing strength of premium motorcycle brands it can be difficult for new entrants to introduce their products into the market. However, the global tightening of emission standards requires motorcycle re-designs and such a trend can trigger the demand for newer, more economical engines. The EU has strict emissions guidelines; currently, emissions of NOX, HC, carbon monoxide (CO), regulating particulate matters and vehicles that do not meet the standards are not saleable.

TRADE EVENTS

The Carole Nash International Motorcycle and Scooter Show, date TBD, Dublin, www.motorcycleshow.co.uk/

RESOURCES & KEY CONTACTS

Associations
The Motorcycle Industry Association, www.mcia.co.uk
National Tyre Distributors Association, www.ntda.co.uk/
Retail Motor Industry Federation, www.rmif.co.uk/association.aspx?id=0
Society of Motor Manufacturers and Traders, www.smmt.co.uk/home.cfm

N O T E S:

The U.S. Commercial Service's Automotive & Ground Transportation team is comprised of specialists, located throughout the Unites States at Export Assistance Centers and in American Embassies and Consulates worldwide, who are dedicated to helping you export. We are the automotive industry's primary export assistance resource and should be your first point of contact if you are looking to sell your auto parts and services overseas. This site provides American companies supplying automotive, truck, or motorcycle-related parts, services, and manufacturing/testing equipment with up-to-date information to help your company succeed internationally. If your company is not currently working with our team member at your local U.S. Export Assistance Center, please contact us today to learn how we can assist you with your export objectives.

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INTELLECTUAL PROPERTY RIGHTS

Your intellectual property rights are an important part of your corporate value and international competitiveness. U.S. trademark, design and patent rights do not by themselves provide protection in Germany or the rest of the European Union (EU), so you must take specific steps to protect your IPR in Europe.

U.S. grants of IP rights are valid in the United States only! You can register in countries individually or, for EU-wide trademark and design protection, you might consider the Community Trademark and/or Registered Community Design. These provide protection for your industrial design or trademark in the entire 27-nation EU mega market of more than 470 million people. Both national trademarks and the CTM can be applied for from the U.S. Patent and Trademark Office as part of an international trademark registration system (www.uspto.gov), or you may apply directly for those trademarks from the Office for Harmonization in the Internal Market (http://oami.europa.eu). U.S. IPR owners should also note that the EU operates on a "first to file" principle and not on the "first-to-invent" principle, used in the United States.

For patents, the situation is slightly different but protection can still be gained via the U.S. Patent Office. Although there is not yet a single EU-wide patent system, the European Patent Office (EPO) does grant individual European patents for the contracting states to the European Patent Convention (EPC), which entered into force in 1977. The 31 contracting states include almost the entire EU membership and several more European countries. As an alternative to filing your patents for European protection with the U.S. Patent Office, the EPO, located in Munich, provides a convenient single point to file a patent in as many of these countries as you like: www.epo.org/index.html.

The larger trade fair organizers offer some sort of legal advice during trade fairs, either thru in-house lawyers or affiliated law firms. They are, however, not in a position to act on behalf (or against) exhibitors unless there is a court decision which clearly stipulates that such an action is legally justifiable (could be an injunction or court order).

- Register your IPR before you exhibit at a trade fair.
- Register with EU Custom's office if you believe that another exhibitor will be infringing on your rights.
- Bring documentation with you to the trade fair; you must be able to demonstrate your ownership. Copies of your patent or trademark rights will suffice.

For information about the U.S. Commerce Department's Strategy Targeting Organized Piracy (STOP!) program, please visit: www.stopfakes.gov. Information on registering your rights is also provided via a telephone hotline (1-866-999-HALT).

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