



Shaping the future

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Shaping the future

The PTW Market of Tomorrow

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President of ACEM

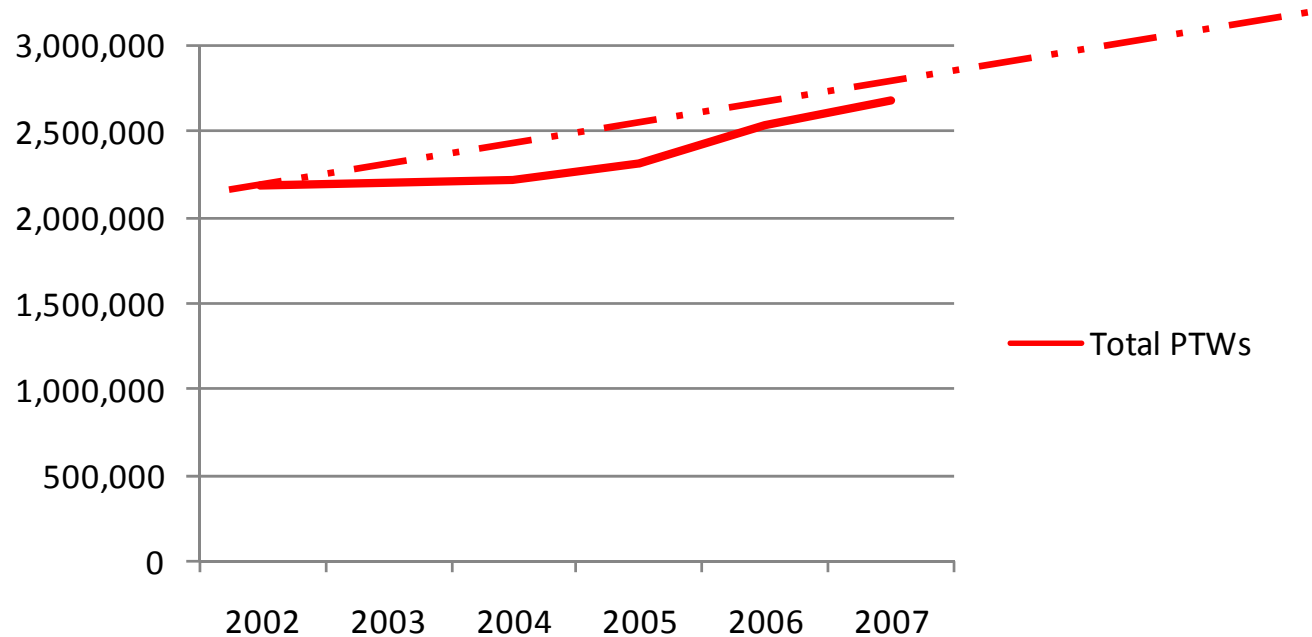
The Motorcycle Industry in Europe

Europe's Population

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



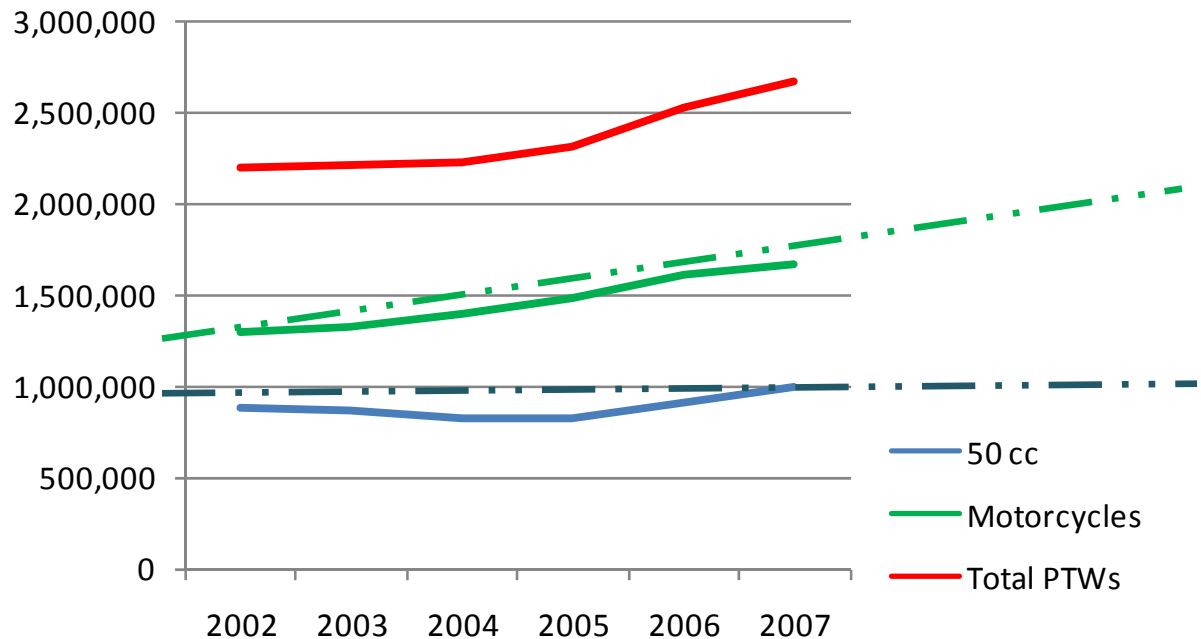
EU PTW Market



6 years of continuous increase pushed by urban mobility needs

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

Evolution of main Segments

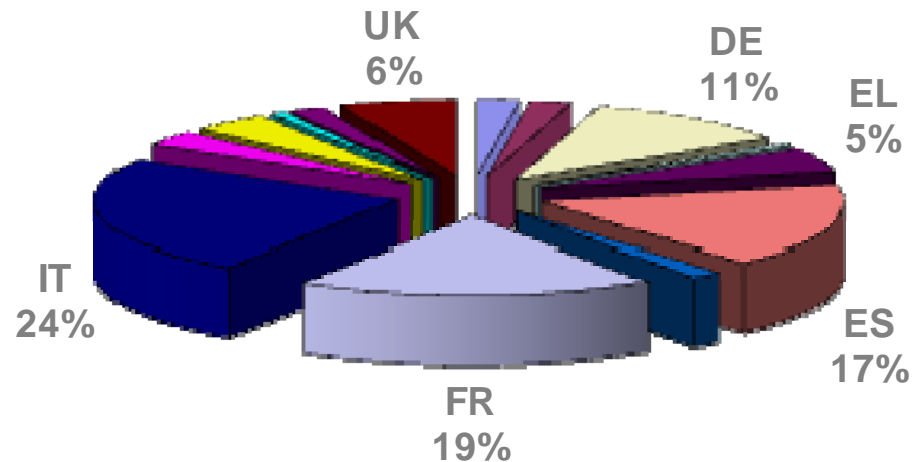


Contrasted trends among PTW categories

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

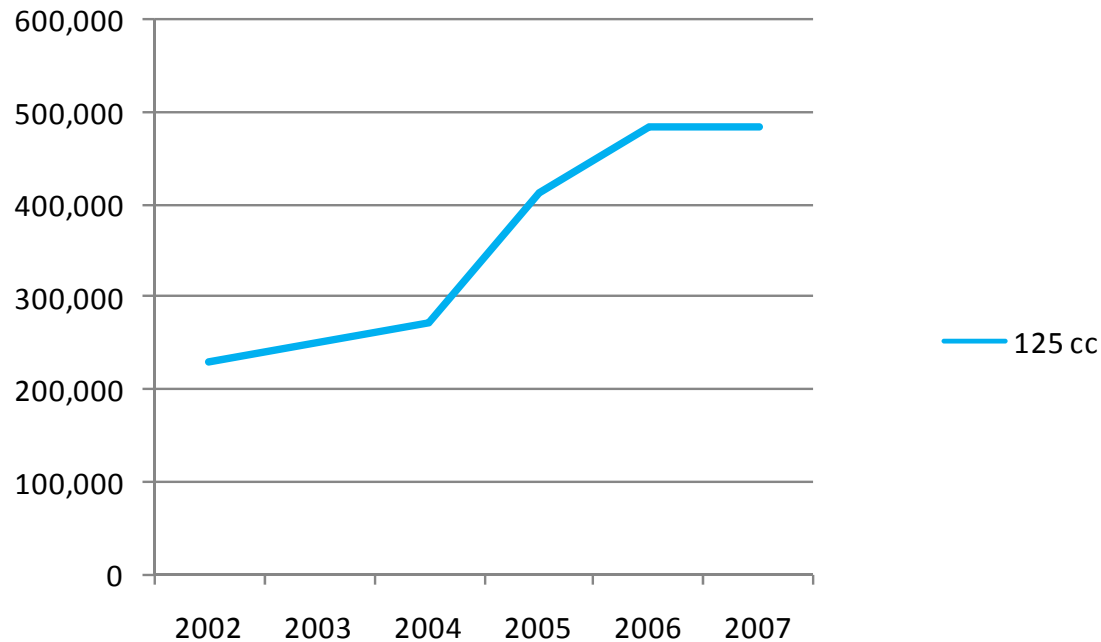
Countries of PTW “culture”

**PTW main countries 2007
(% market share)**



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

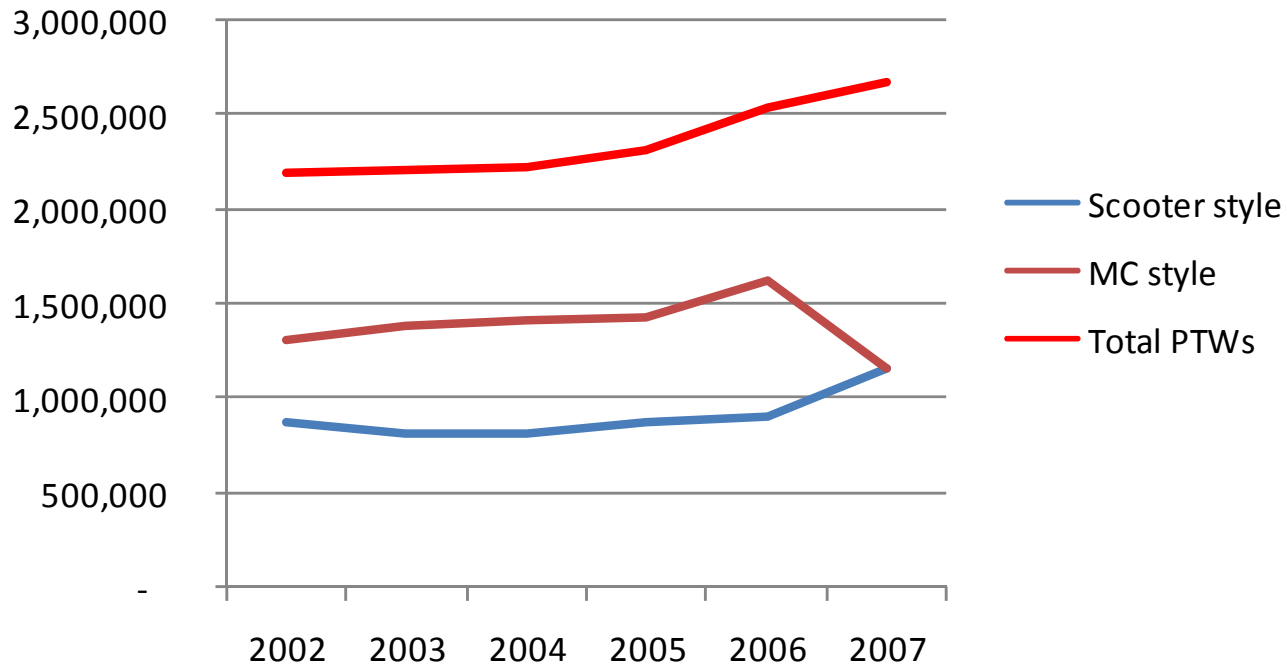
Focus on the 125cc Segment



Significant increase of 125 cc: + 100 % over the period

Increasing congestion and mobility needs boosted the segment

Focus on Scooters

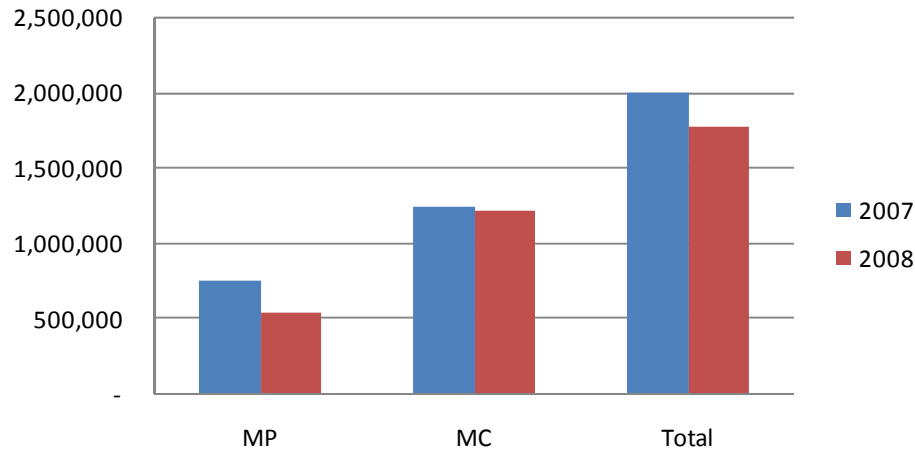


Significant increase of Scooter style: + 33 % over the period

Congestion creates a growing demand of (urban) PTWs

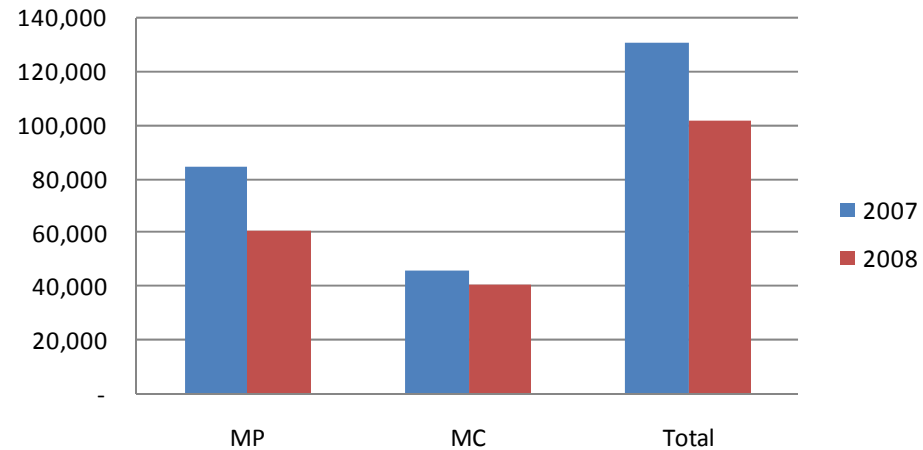
Latest Information

Jan-Sept. 2007/2008 Comparison



-12%

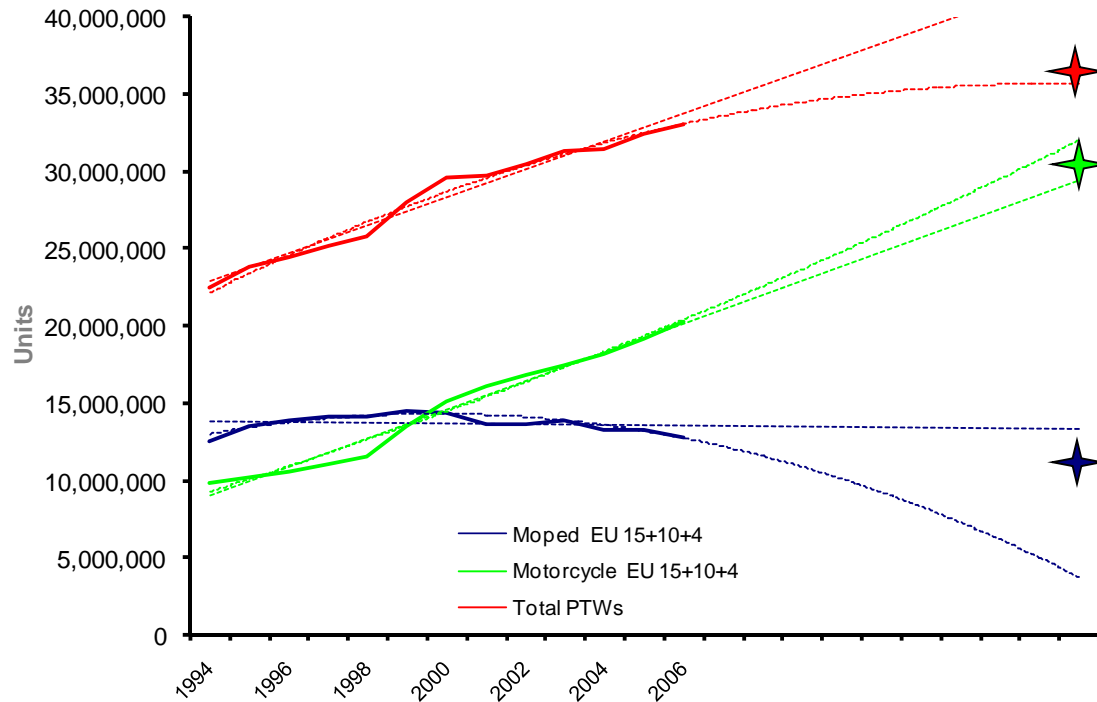
October 2007/2008 Comparison



-20%

Impact of the crisis?

Fleet Forecasts – Main Segments

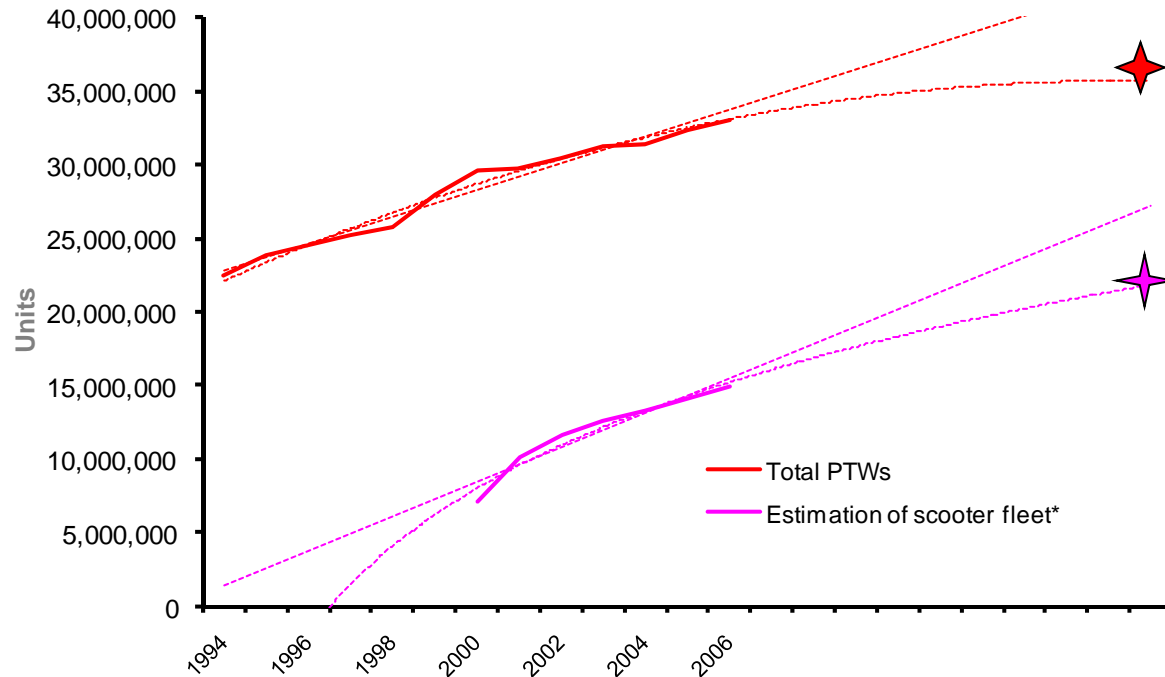


10 years outlook PTWs **37 million units** (+ 12 % vs. 2006)

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

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

Fleet Forecasts - Scooters



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



EU Market - Main Conclusions

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

