

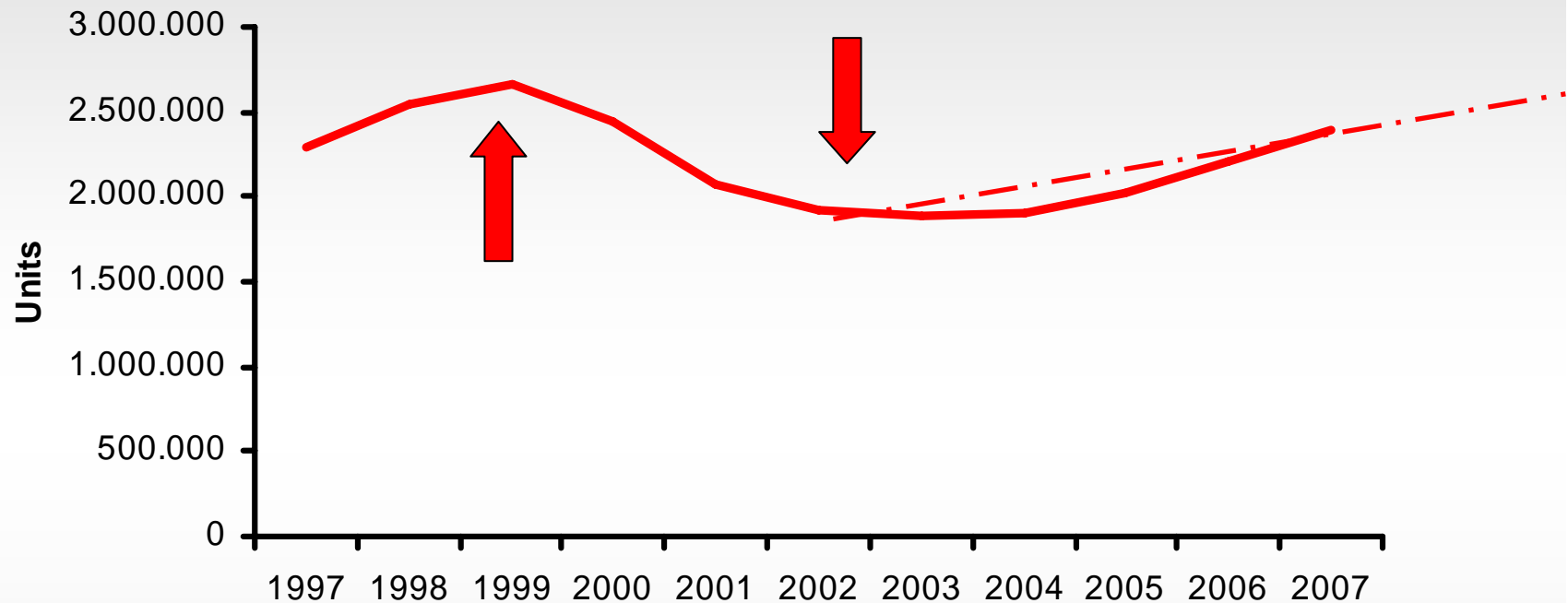


**The PTW market**

**A sum of contrasts**

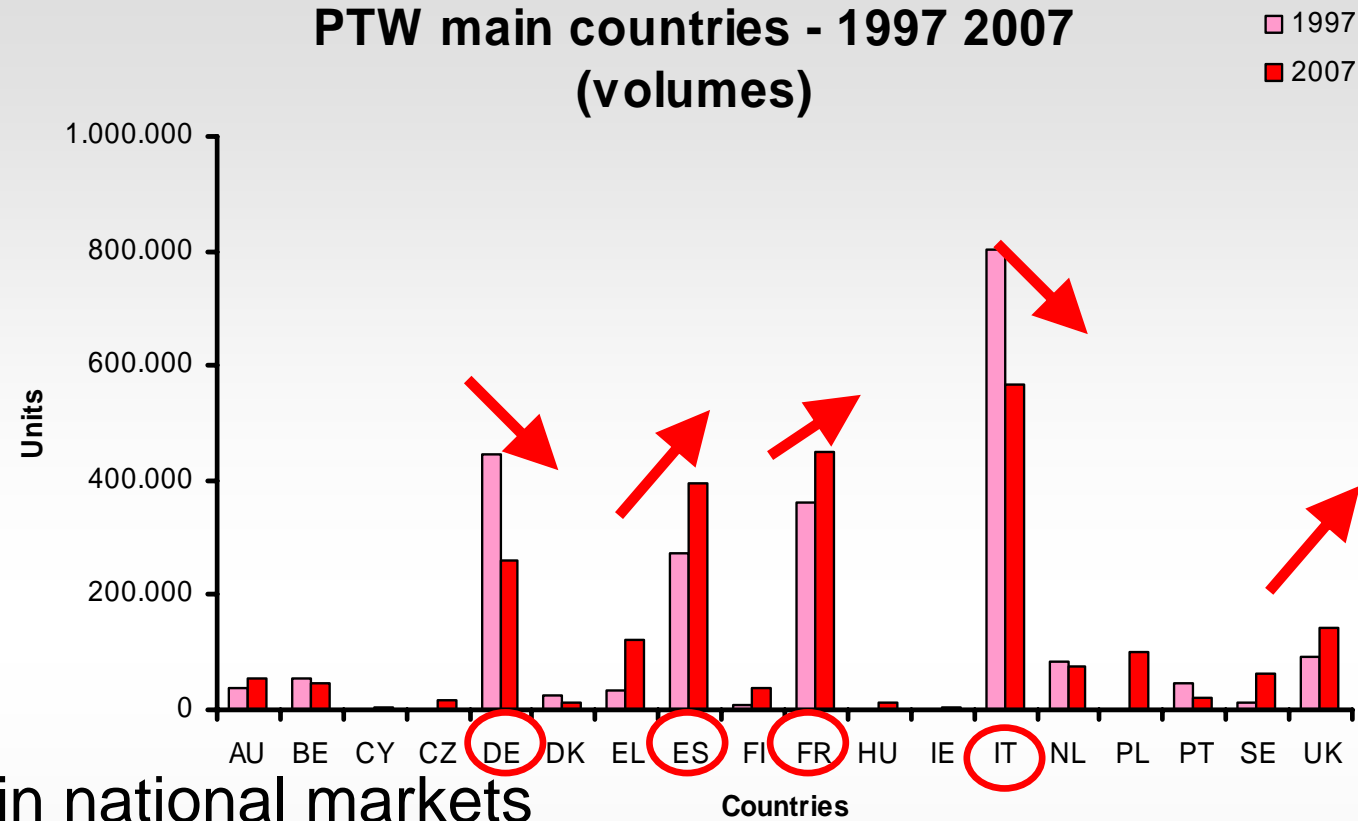
**Jacques Compagne - Secretary General**

## EU PTW Market 1997 - 2007



- Peak in 1999 above 2,7 million vehicles
- Correction 2000 – 2002 below 2,0 million
- Followed by a continuous positive regular trend

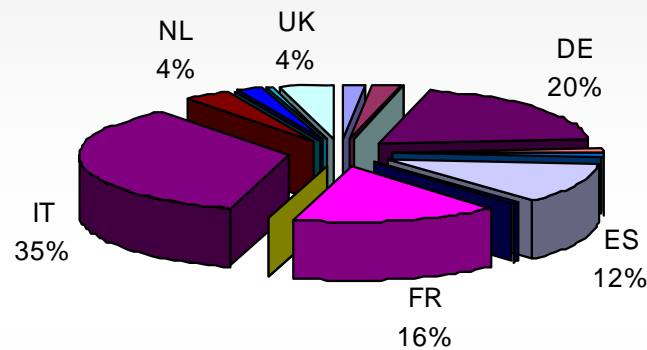
### PTW main countries - 1997 2007 (volumes)



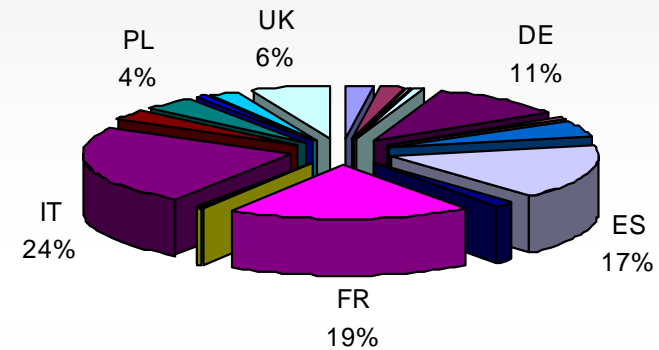
- 4 main national markets
  - Germany
  - Spain
  - Italy
  - France
  
- With contrasted trends

# 6 countries only represent 90% of the EU PTW market

PTW main countries 1997  
(% market share)



PTW main countries 2007  
(% market share)

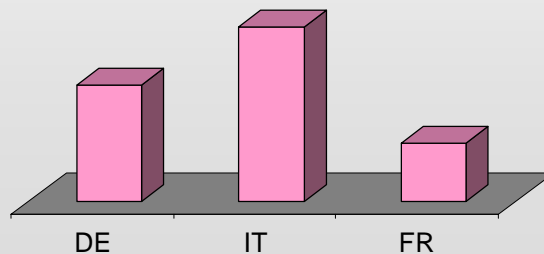


## Top 3 countries

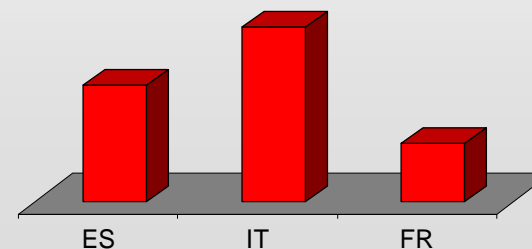
2007 Germany disappears

Spain get the second position

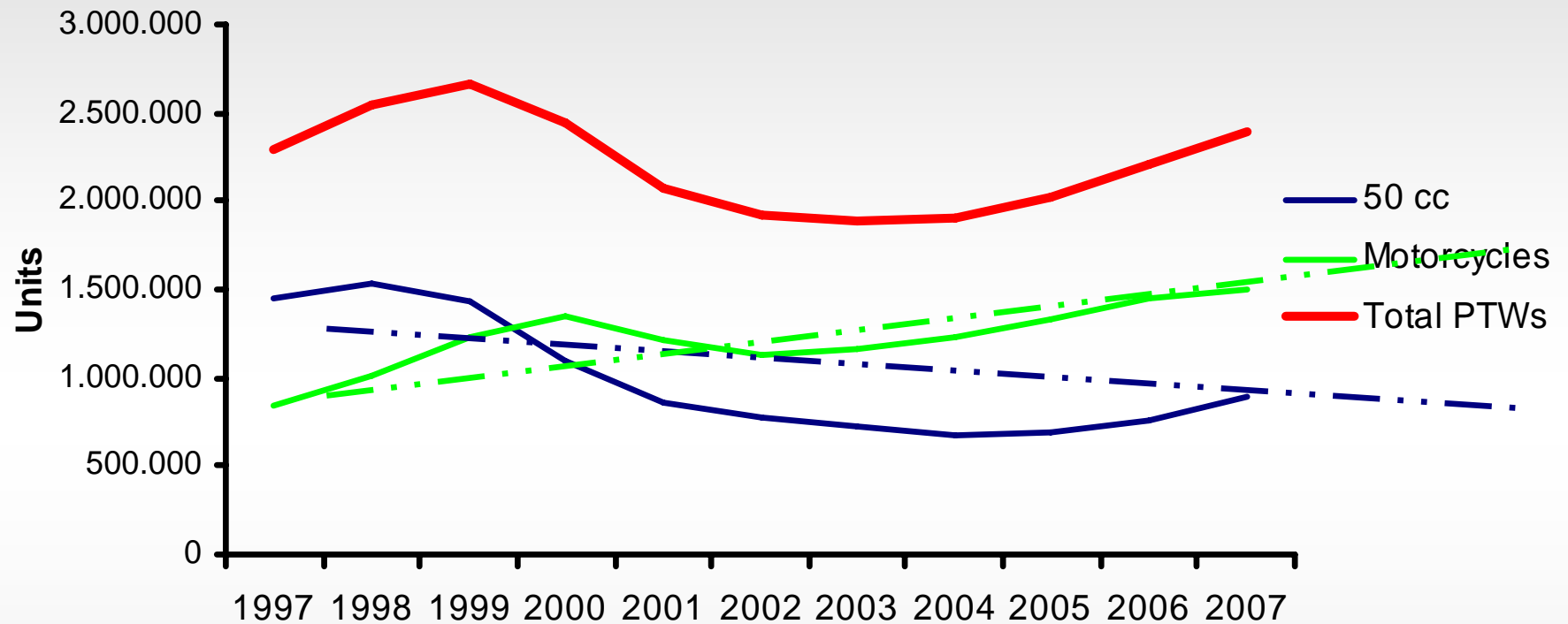
Top 3 - 1997



Top 3 - 2007



## EU PTW main segments 1997 - 2007



- Contrasted trends
  - Moped down
  - Motorcycles up

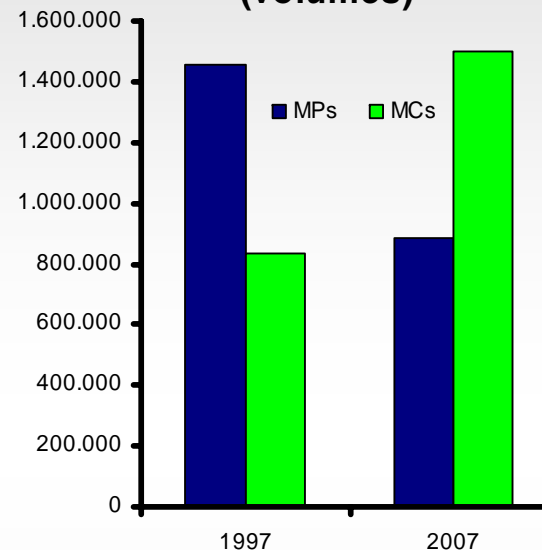
# Mopeds Versus Motorcycles

Reverse evolution

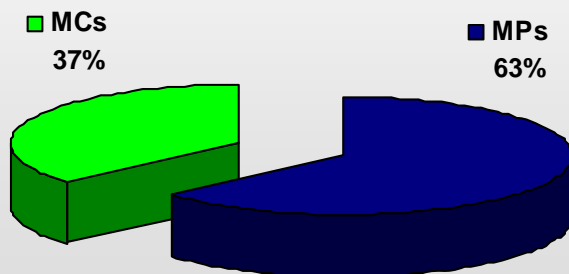
- In volumes
- In market share

*EU market description*

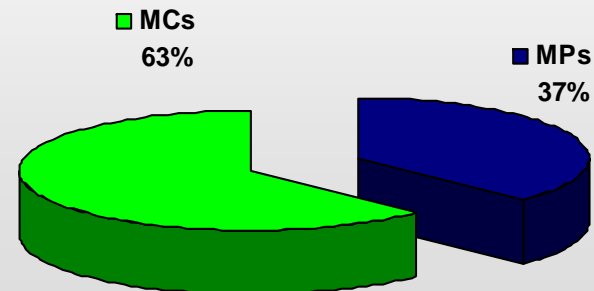
**PTW Market Split  
1997 - 2007  
(volumes)**



**PTW Market Split - 1997  
(% market share)**



**PTW Market Split - 2007  
(% market share)**

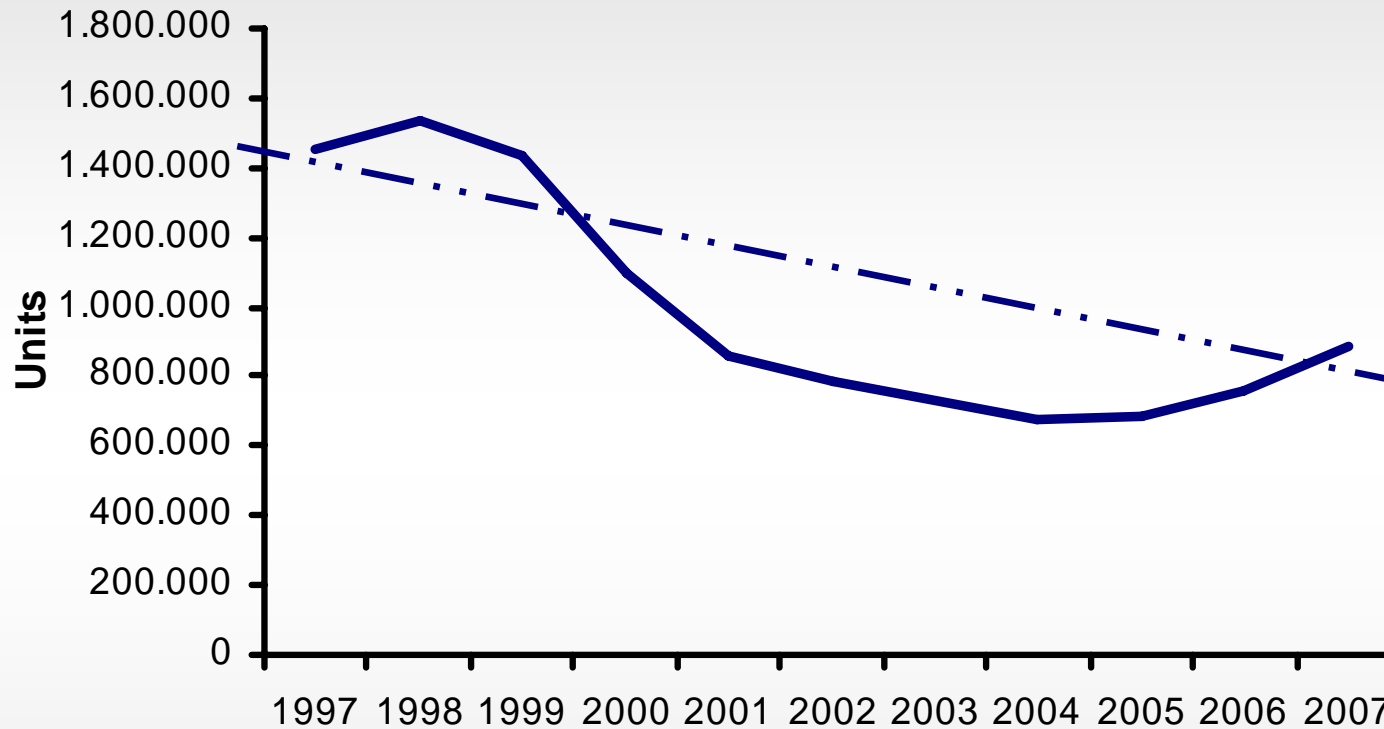




## Focus on the EU moped segment

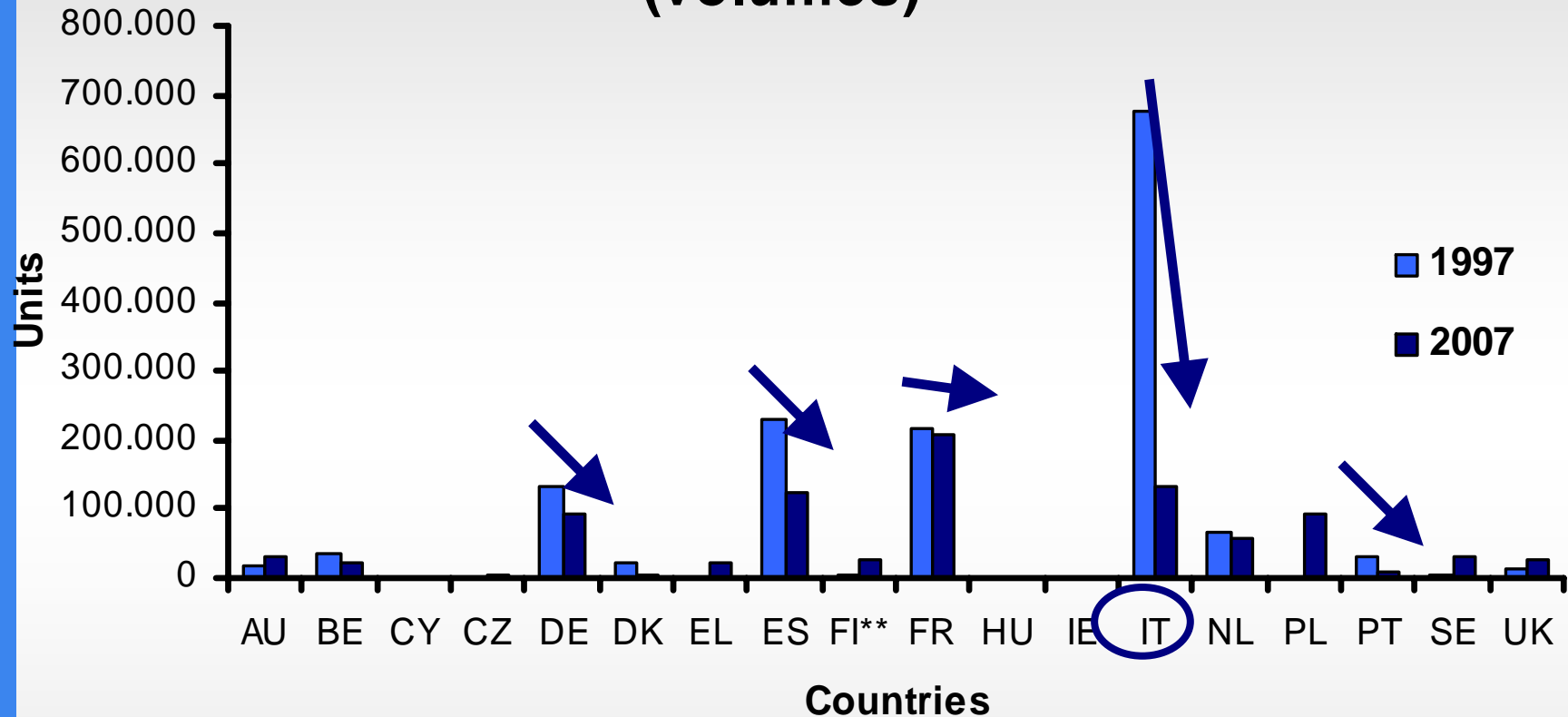


## EU moped segment 1997 - 2007



- Volumes divided by 1,6 in 10 years
- Since 1999, a steadily negative trend stopped in 2005

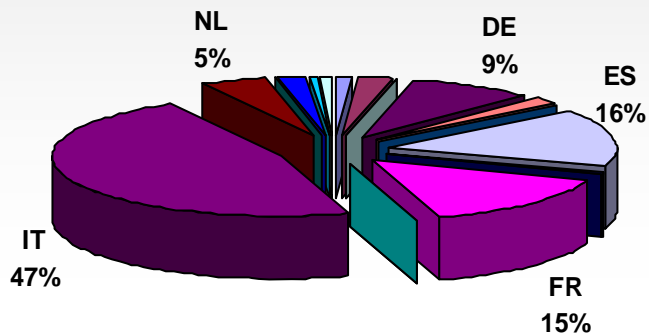
## Moped main countries 1997 - 2007 (volumes)



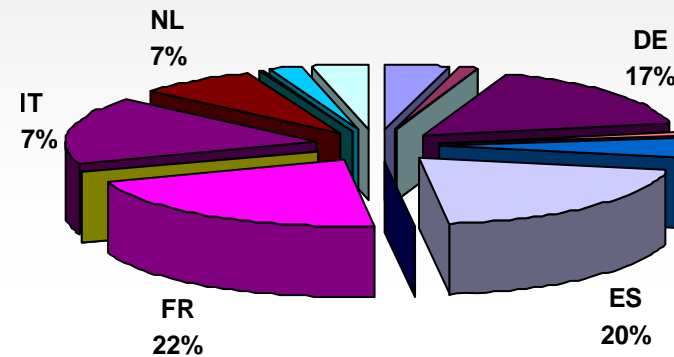
- Negative trend in all moped countries
- With a spectacular drop in Italy

# 5 countries represent over 80% of the EU moped market

Moped Countries 1997  
(% market share)



Moped Countries 2007  
(% market share)

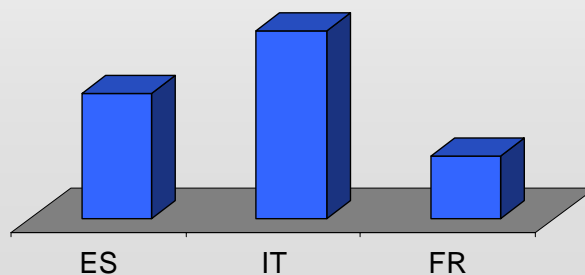


## Top 3 countries

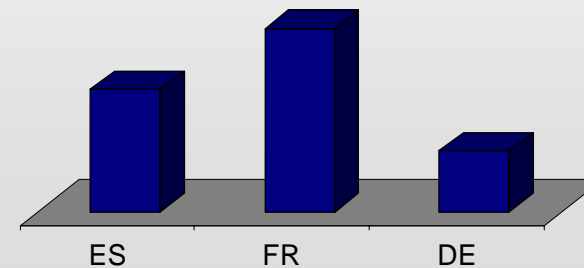
2007 Italy disappears

France get the pole position

Top 3 - 1997



Top 3 - 2007

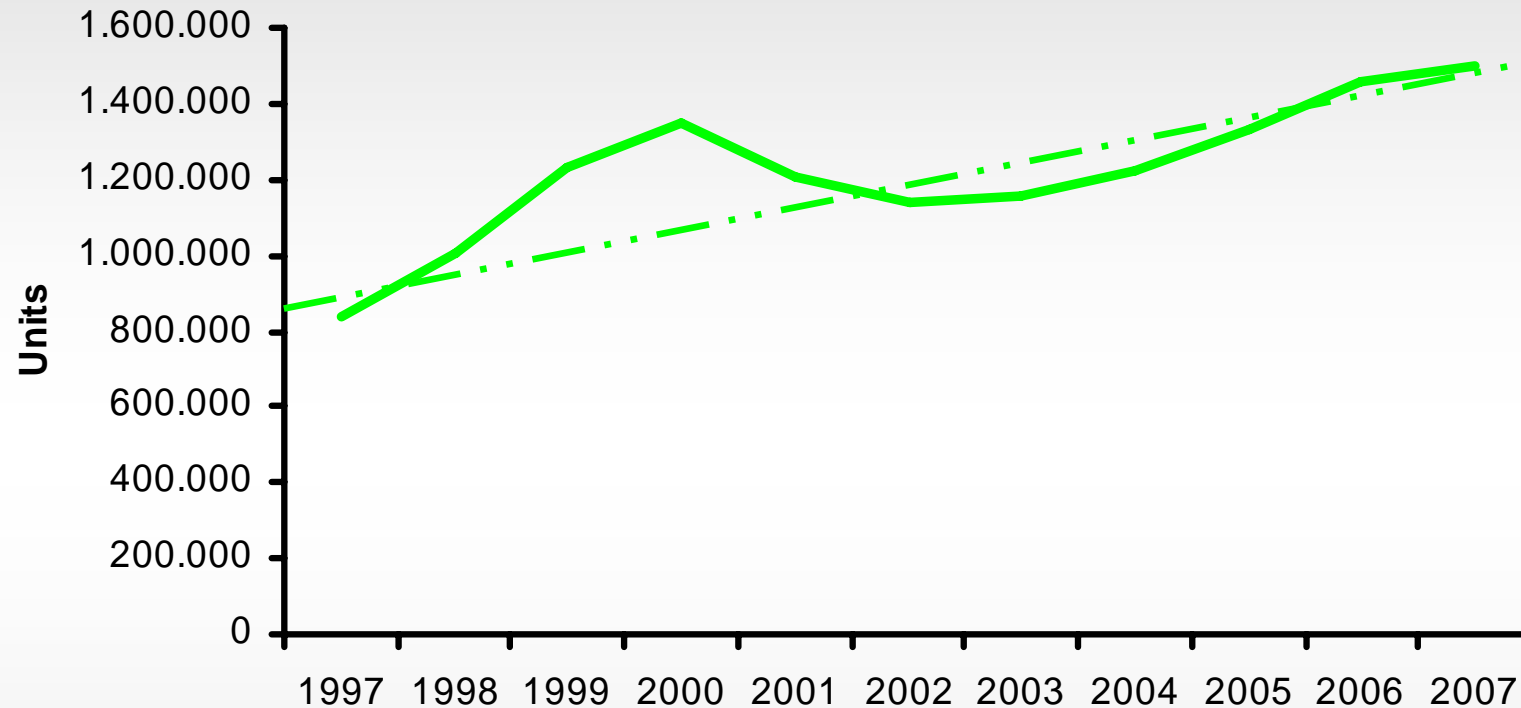




# Focus on the EU motorcycle segment

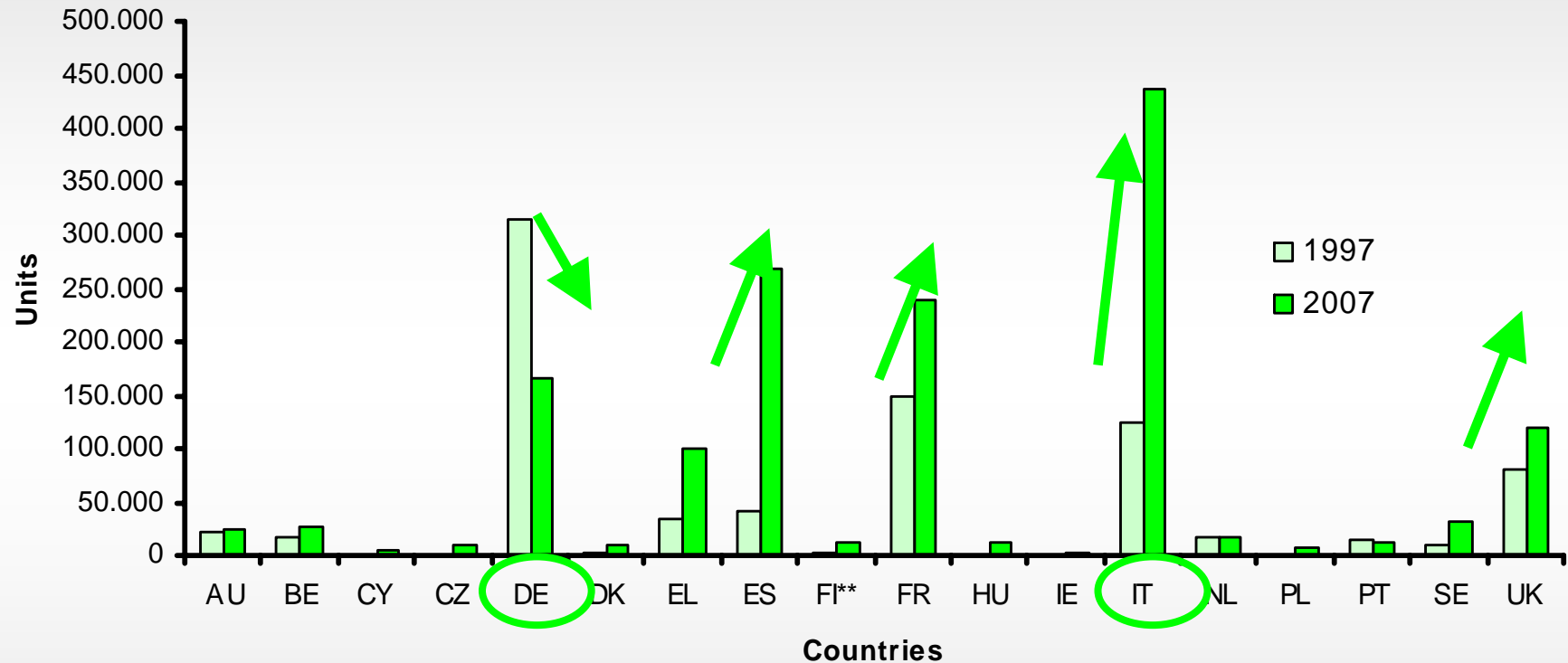


## EU MC Segment 1997 - 2007



- En route towards doubling the volumes
- A continuous positive trend with a slight correction in 2001 and 2002

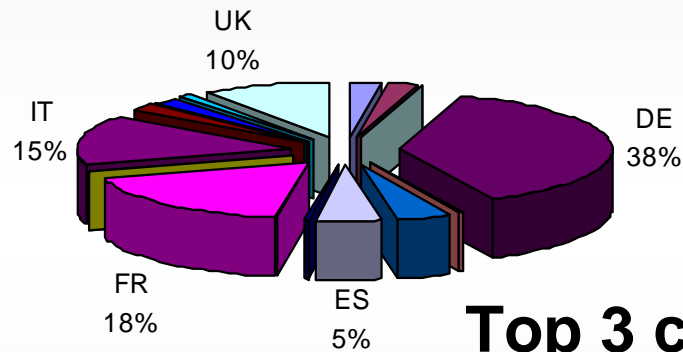
## MC main countries 1997 - 2007 (volumes)



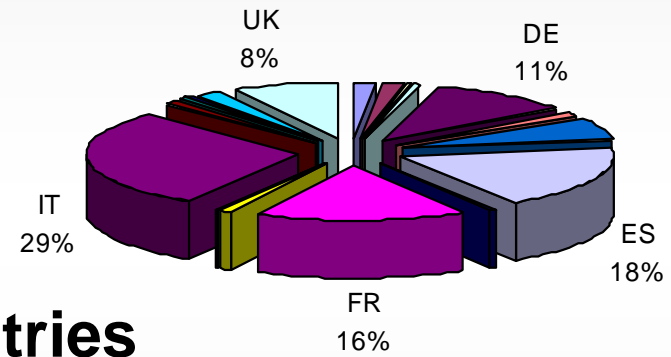
- Similar positive trend except for Germany
- With a spectacular growth in Italy

# 5 countries represent over 80% of the EU motorcycle segment

MC Countries - 1997  
(% market share)



MC Countries - 2007  
(% market share)

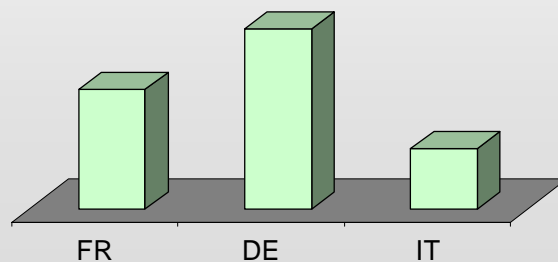


## Top 3 countries

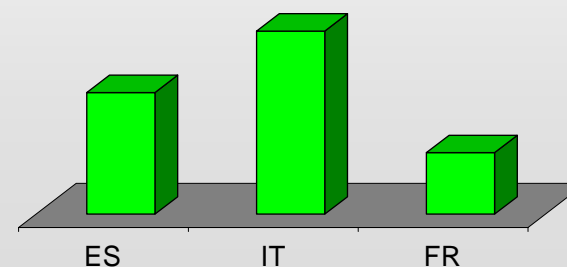
2006 Germany disappears

Italy get the pole position

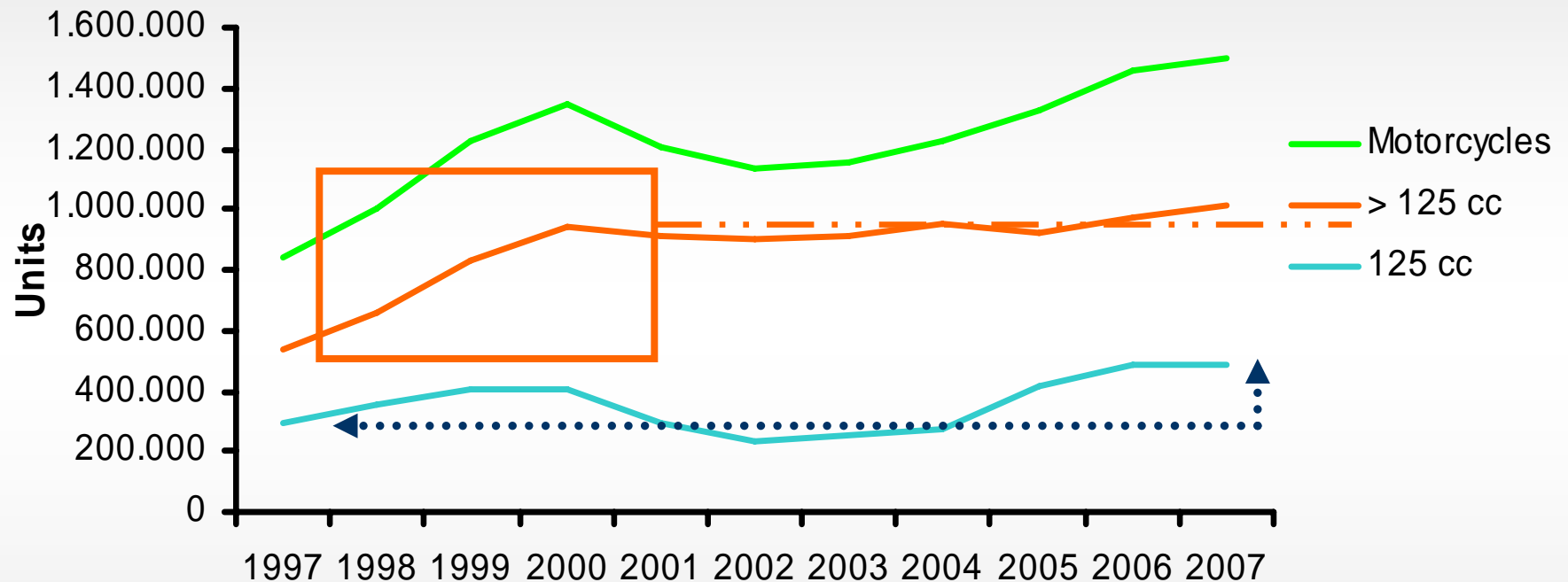
Top 3 - 1997



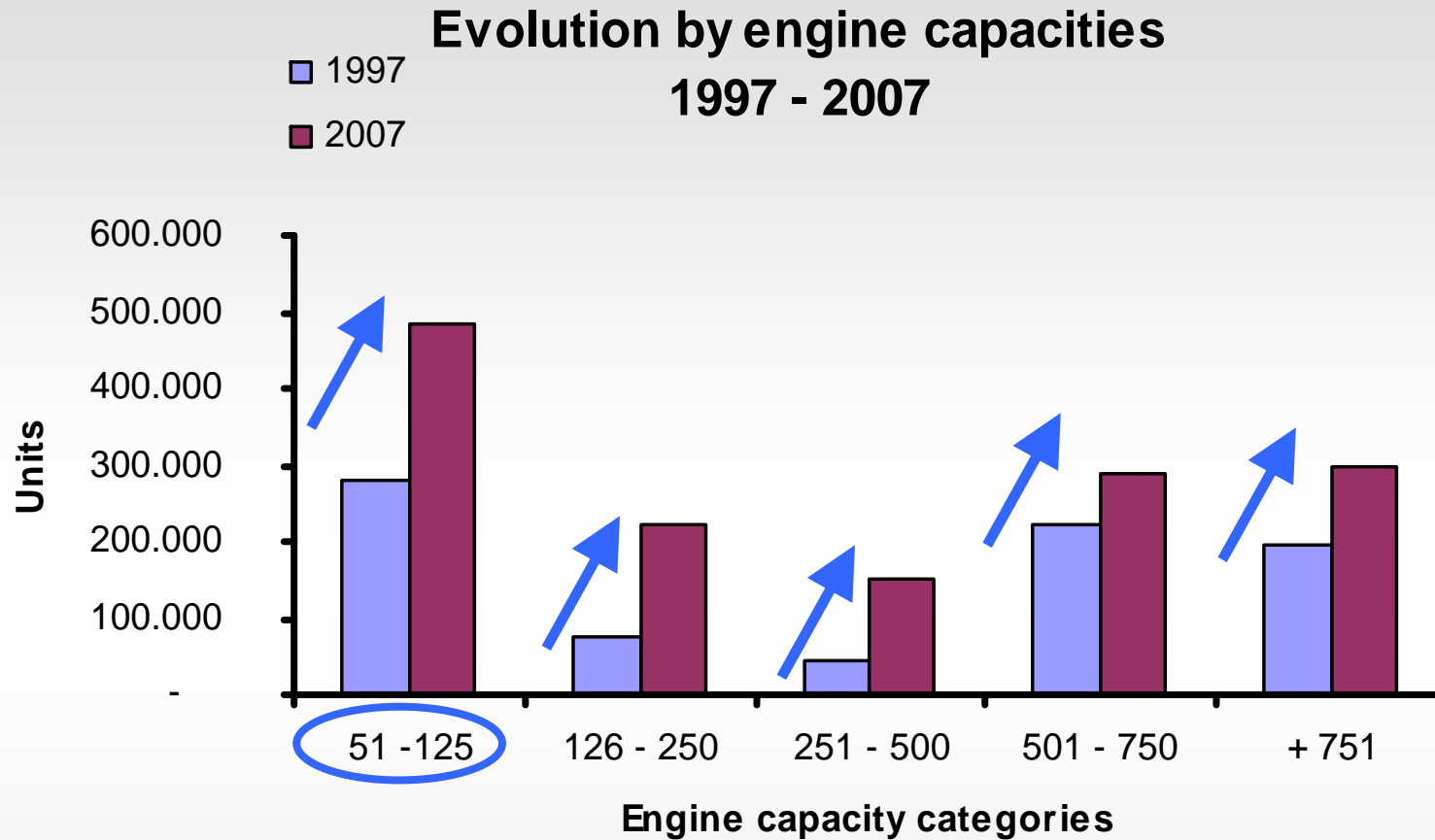
Top 3 - 2007



## EU Motorcycle segment - 125cc and over 1997 - 2007



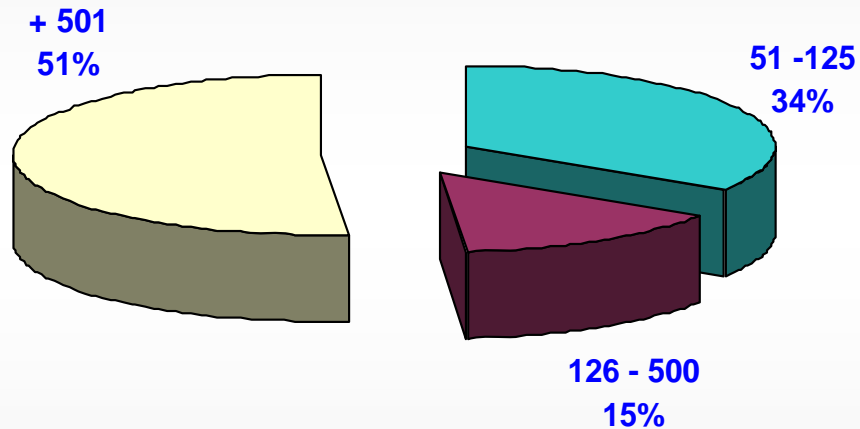
- 125 cc category doubled its volumes
- Over 125 cc had a considerable jump between 97 and 2000
- Then stability over 125 cc since 2000



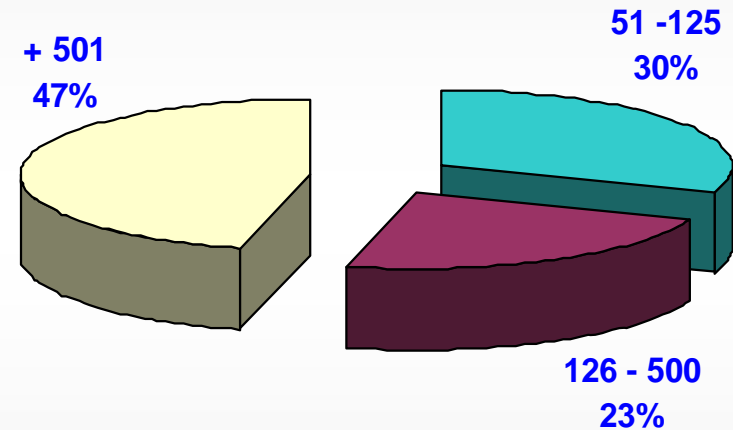
- All engine capacity categories have raised
- The 125 cc category keeps the lead

## Predominance of MCs below 500 cc in 2007 with a 53% market share

Engine capacity categories - 1997  
(% market share)

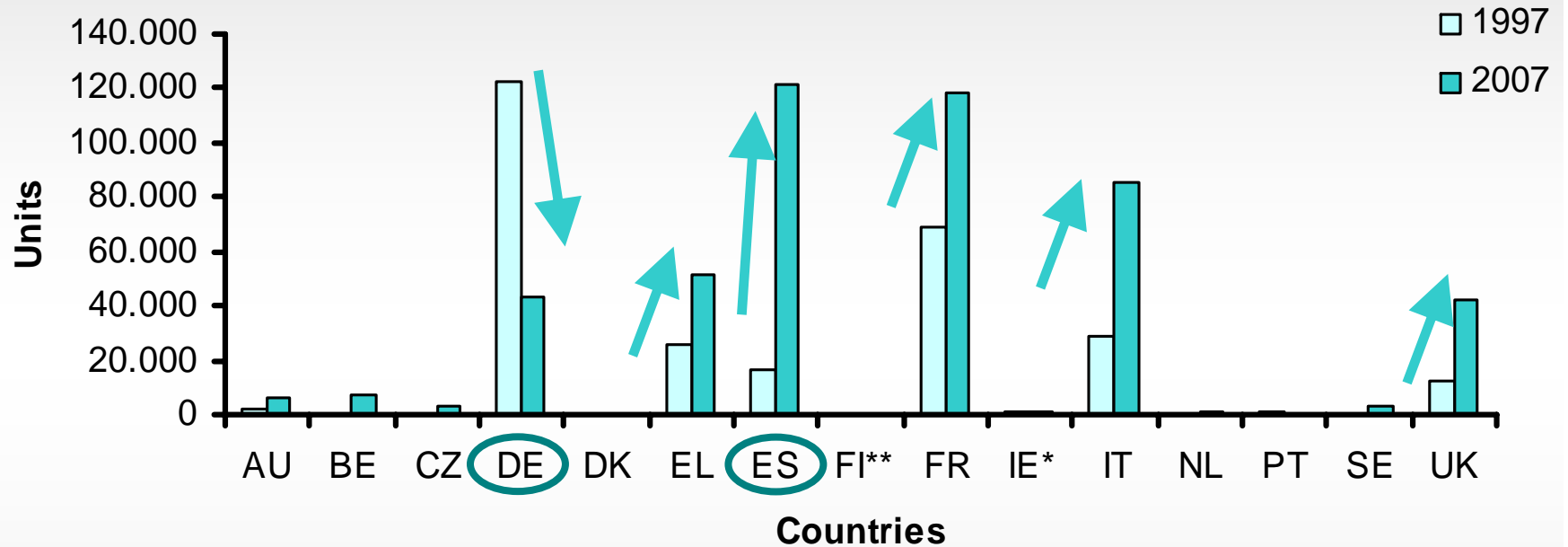


Engine capacity categories - 2007  
(% market share)



- 125cc lost 4% with a 30% market share
- 126 – 500 +8%
- 501 and over about -4%

## 125cc main countries 1997 - 2007 (volumes)



- Similar positive trend
- Except for Germany
- With a spectacular growth in Spain

## Motorcycling – 30 million users in EU 27

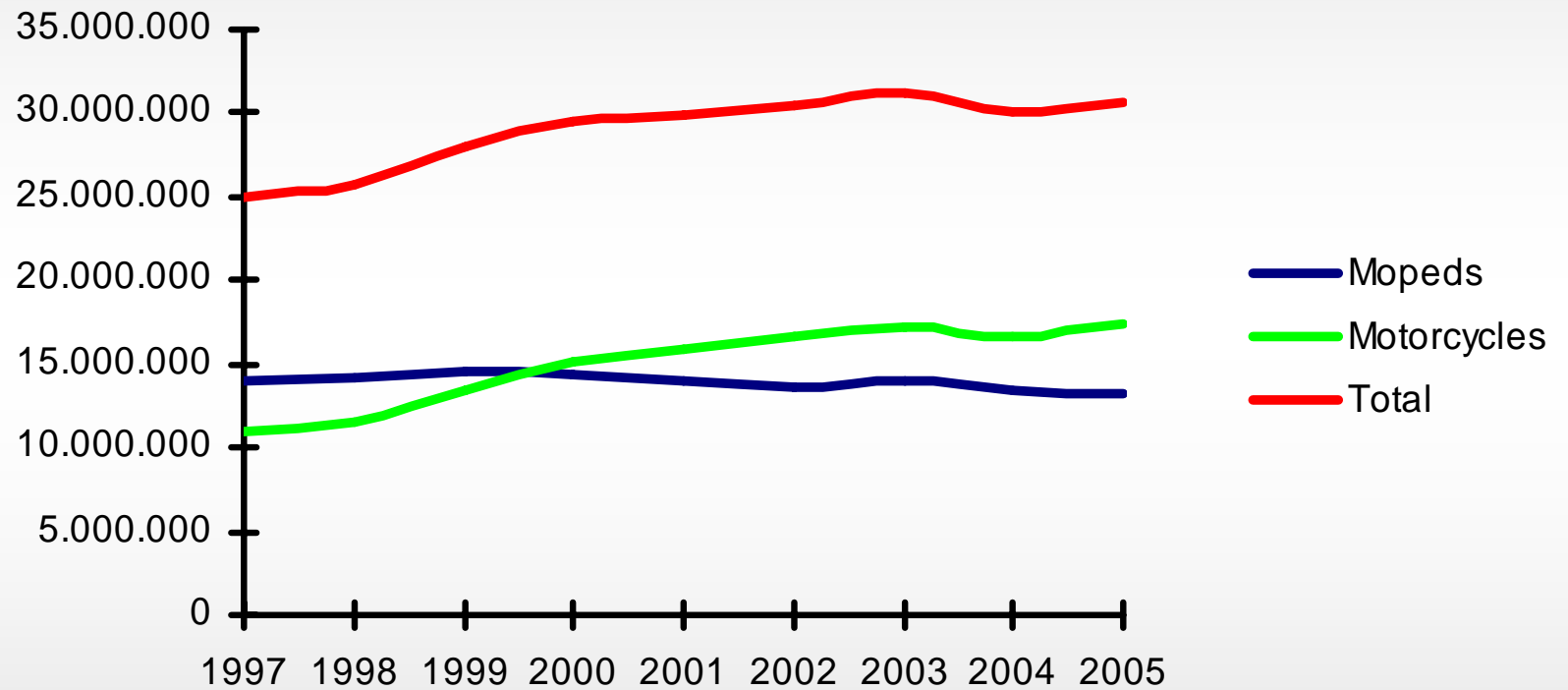
- Diversity of owners, purposes and products





# Circulating park trends

## Last update





version May 2008

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