



MOTORCYCLES

EUROPEAN MARKET BRIEFS

2013 - 2014



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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!

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(*) EU Safety and Type-Approval Information

AUSTRIA



Capital: Vienna
 Population: 8.4 million
 GDP 2012: \$406 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 historical and economic ties to the growth markets of Eastern and Southeastern Europe also make it a logical base for serving those markets. Approximately 350 U.S. firms have subsidiaries, affiliates, franchisees or 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.

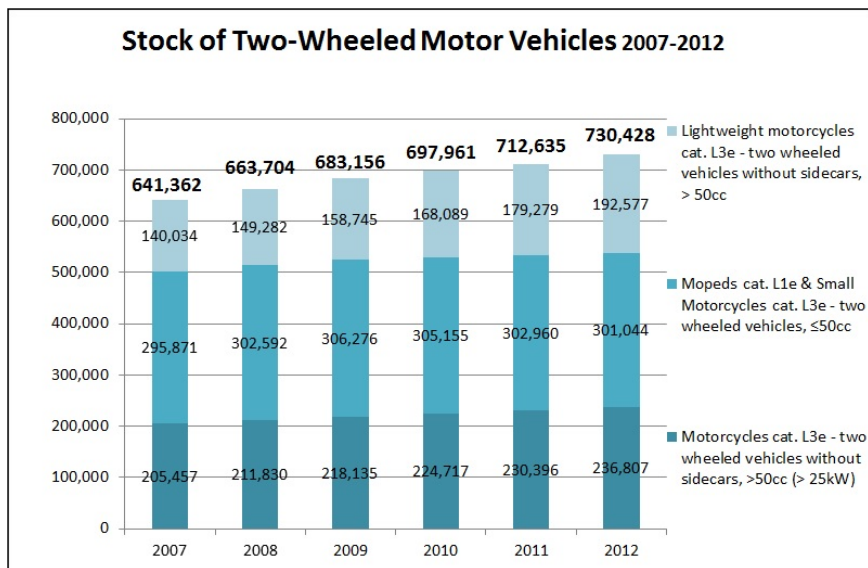
The Austrian motorcycle market reached an estimated 478 million Euros (\$669 million) in 2011, up from 435.5 million Euros (\$607 million) in 2010. There are currently over 730,400 motorcycles registered in Austria, of which 46,000 new vehicles were added in 2012. The Austrian motorcycle market is dominated by European and Japanese manufacturers such as Vespa, Honda, KTM, and BMW. U.S. market share is a modest 2.9%. KTM is the only significant motorcycle manufacturer in Austria, exporting 95% of its production, primarily to Germany.

Throughout this report, to the extent possible, we will use the following definitions:

Classification	Cylinder Size (cubic centimeters)	Power or Speed Restrictions
Moped	≤50cc	max. 45 km/h (28mph)
Small Motorcycle	≤50cc	none
Lightweight Motorcycle	≥50cc	Power limit: ≤25kW
Standard	≥50cc	none

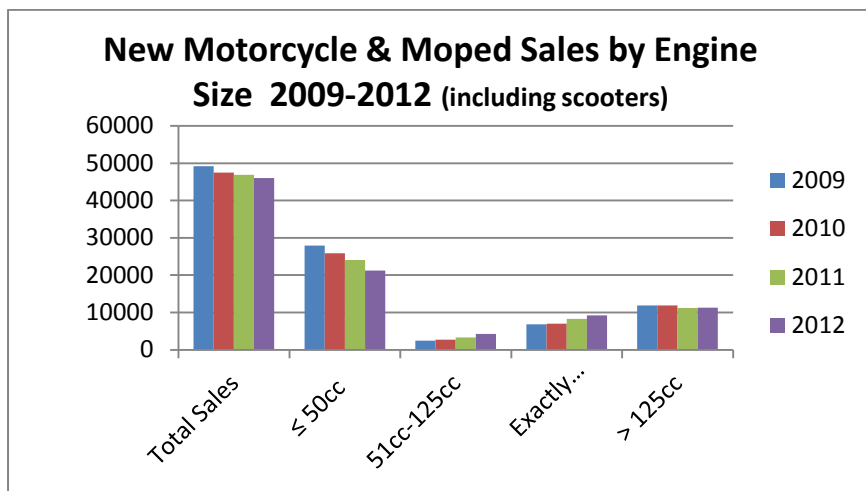
MARKET SIZE

There are currently over 730,400 motorcycles registered in Austria, of which 46,000 new vehicles were added in 2012. The Austrian motorcycle market reached an estimated 478 million Euros (\$669 million) in 2011, the latest date for which figures are available, up from 435.5 million Euros (\$607 million) in 2010.



Source: STATISTICS AUSTRIA, *Stock of motor vehicles, various reports.*

As you can see from the chart above, the moped and motorcycle fleet has been slowly increasing over the past several years. The fastest-growing sector is clearly lightweight motorcycles >50 cc. Sales according to engine size can be seen in the chart below:



Source: Arge2Rad. Multiple Reports. Compiled in March 2013

COMPETITION

KTM is the only significant motorcycle manufacturer in Austria.

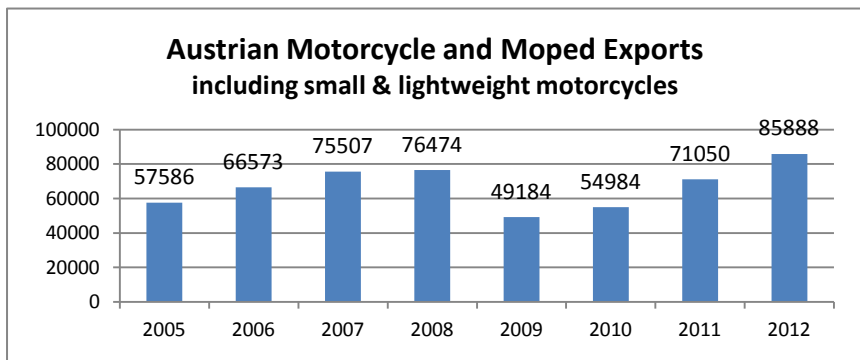
Rank	Name	Total	Mopeds	Over 125ccm	Motor Scooters	125cc segment	Over 50cc m
	Total	46047	21201	11330	7970	9230	24846
1	Vespa	6722	1961		2594	2594	4761
2	Honda	3619	119	1439	1295	1471	3500
3	Ride	3125	2679		446	446	446
4	Derbi	2581	2394		86	112	187
5	KTM	2541		2171		370	2541
(16)	Harley-Davidson	981		981			981
(89)	Indian	4		4			4
(93)	Boss Hoss	3		3			3

Source: ARGE2RAD, Gesamtmarkt 2012/2011. Compiled in February 2013.

The clear market leader in total is Vespa, which leads in all categories of motorcycle. The Austrian manufacturer KTM currently ranks 5th in total market share, and 1st in the over 125cc segment. Harley-Davidson, Boss Hoss and Indian are the only U.S. brands with a share of the Austrian market. In total, the U.S. market share was a modest 2.9% in 2011, down from 3.3% in 2010.

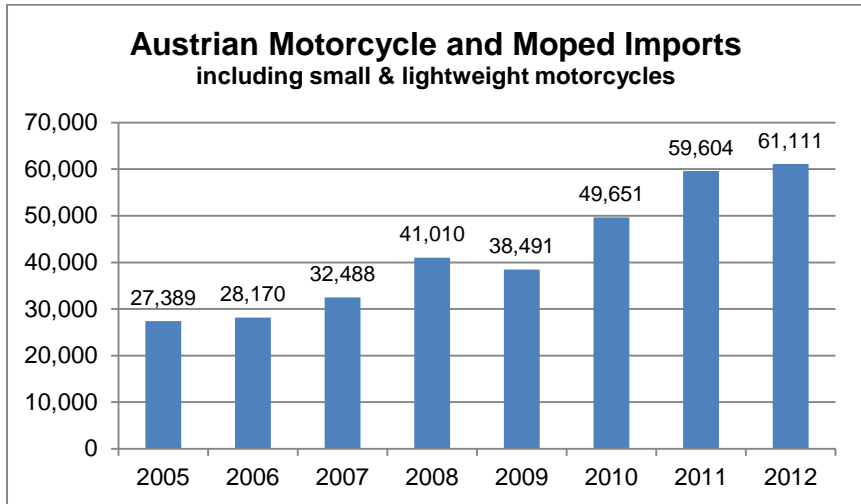
TRADE

In 2012 Austria exported close to 95% of the motorcycles and mopeds produced domestically. The following chart captures exports of new and used vehicles:



Source: Wirtschaftskammer Österreich, Motorisierte Zweiräder, Motorräder, Compiled in January 2013.

Motorcycle imports are significantly lower than exports:



Sourcetschaftskammer Österreich, Motorisierte Zweiräder, Motorräder, Compiled in January 2013.

OPPORTUNITIES

Opportunities exist for U.S. exporters in developing supplier relations with KTM, which sells a significant portion of their production to the United States. Exporters might also find business opportunities with motorcycle accessories such as helmets, which are mandatory.

Another niche market that might prove interesting is electric motorcycles. This category of motorcycle had zero registrations in 2006, but climbed to over 100 units per year in 2010 and 2011, then dropped to 81 in 2012. Several e-mobility projects are in place across Austria to try to encourage alternatives to individual motorized transportation. The most common program type includes a ticket for the public transportation in combination with access to some kind of electric vehicle, an electric bicycle, scooter, or car.

REGULATORY FRAMEWORK

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. Motorcycles are also required to pass the European Union's environmental and safety requirements, but there are no significant trade barriers or limitations on U.S. motorcycles.

The import duty rate on motorcycle imports from the United States for 250cc and below is 8%. For motorcycles above 250cc it is 6% on vehicles from the U.S.. There is also an import VAT of 20% (Einfuhrumsatzsteuer) on all motorcycles imported into Austria.

TRADE EVENTS

There are no significant trade shows in Austria covering the motorcycle sector. Dealers travel to the larger shows in Italy and Germany. Smaller shows aimed at the public include:

PS Show 2013 – Auto, Motorcycle, Motorsport and Tuning, 25. – 27. October 2013, Wels
<http://www.ps-show.at/>

Auto & Bike 2014 – April 2014, Klagenfurt
<http://www.biztradeshows.com/trade-events/auto-bike.html>

BELGIUM



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

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SUMMARY

BELGIAN MOTORCYCLE MARKET

In 2012, the Belgian motorcycle market closed the year with 25,276 newly registered motorcycles (including Tricycles and Quads), which is a slight decrease of 7% as compared to 2011. More than 160 constructors had a least one motorbike registered.

Chinese Brands are among the newcomers trying to get into the Belgian motorcycle market. The accession of some electrical powered bikes is remarkable, as brands like Govecs, Brammo, Zero Motorcycles, or the Spanish Jotagas enter the market. The strongest electrical newcomer on the Belgian market is Renault's Twizzy, with 363 sales.

It is notable that in a decreasing market, some have to give up market share. Despite of the decline of registrations, Piaggio remains the market leader. Others have had to give in their positions in the rankings. Ducati and Suzuki fell out of the top 10, but others like KTM are entering the top 10 ranking in Belgium for the first time.

BEST SELLERS

Rank	Brand	2012	%	2011	%
	Total registrations	25 276		27 024	
1	PIAGGIO	3 594	14.2%	4 517	16.7%
2	HONDA	3 289	13.0%	3 099	11.5%
3	BMW	2 161	8.5%	2 010	7.4%
4	YAMAHA	2 095	8.3%	2 719	10.1%
5	SYM	1 681	6.7%	1 848	6.8%
6	HARLEY-DAVIDSON	1 249	4.9%	1 278	4.7%
7	KAWASAKI	1 211	4.8%	1 249	4.6%
8	KYMCO	1 058	4.2%	1 262	4.7%
9	KTM	1 004	4.0%	771	2.9%
10	NECO	961	3.8%	860	3.2%
11	SUZUKI	880	3.5%	1007	3.7%
12	TRIUMPH	772	3.1%	783	2.9%
13	DUCATI	601	2.4%	683	2.5%
14	SKYTEAM	418	1.7%	410	1.5%
15	RENAULT	363	1.4%	0	0.0%

Source: Mobility & Transport - FEBIAC

MOTOR MARKET ACCORDING TO CYLINDER CAPACITY

cc	2011				2012			
	New		Second hand		New		Second hand	
< 126	11 562	43%	14 847	20%	10 253	41%	16 181	21%
126-250	1 504	6%	5 736	8%	1153	5%	5 314	7%
251-500	3 482	13%	8 448	11%	3078	12%	8 346	11%
501-750	3 122	12%	21 037	28%	3744	15%	21 041	28%
751-1000	2 801	10%	11 437	15%	2474	10%	11 173	15%
> 1000	4 553	17%	13 719	18%	4574	18%	13 341	18%
Total	27024	100%	75224	100%	25276	100%	75396	100%

Source: Mobility & Transport - FEBIAC

OUTLOOK AND EXPECTATIONS

Honda is aiming high; they want to be number 1 again in the Belgian market. Last year the 'Big Red' gained ground on the market leader "Piaggio". The broad range of this constructor lends itself for the top position. BMW is also optimistic. The introduction of the new R1200GS went well at the January exhibition in Brussels. However, the Austrian KTM is competing for part of that market share with their 1190 Adventure.

The importance of the allroad-segment should not be underestimated. For Suzuki, impatiently waiting for the V-Strom 1000, the V-Strom 650 remains their most important model for 2013.

Also for Kawasaki, hopes are high because in a decreasing market they could maintain their spot in the rankings. In 2013, the new Z800 will have to fulfill expectations created by its predecessor.

Aprilia started this spring with the delivery of the Caponord 1200, which will have to become the draft-horse for the sportive Aprilia range. Similar sounds are coming from Ducati North Europe. The Multistrada 1200 is focusing more on the tour segment of the market.

A sound ambition sounds with Harley-Davidson, Triumph, and Victory. For Victory, everything still needs to start. Starting commercialization with 2 bikes in 2011, it increased sales to 20 bikes in 2012. With the model Trophy, Triumph is seeing potential in the Belgian market for more than 850 motorbikes. Compared to 2009-2010, Harley-Davidson has had two top years, and expects to improve sales even more.

The choice for budget friendly bikes presents a clear trend, although there is always a market for the premium segment. The fear is that mid-segment bikes will be put under further pressure, but the general impression is that market decline is slowing down and the market will grow again from 2014 onward.

TRADE EVENTS

European Motorshow Brussels 2014:

The Motor Show takes place from 14 until 26, January 2014 in Brussels.

<http://autosalon.be/nl/salon/exposant/>

SOURCES AND CONTACTS

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CZECH REPUBLIC



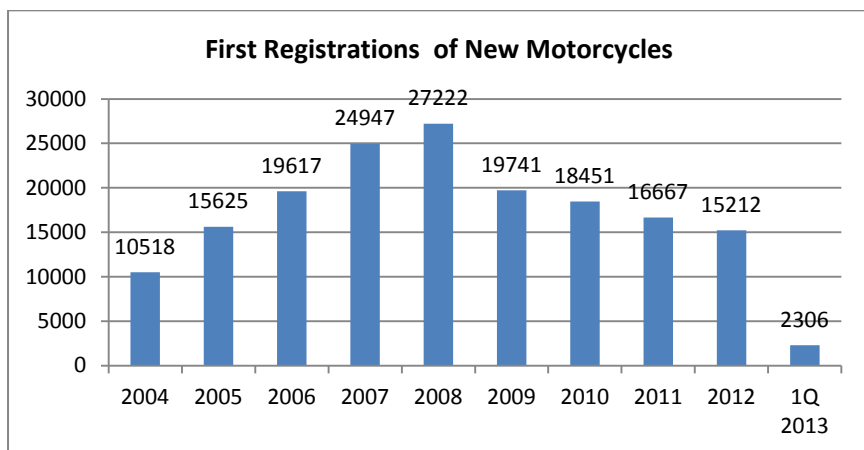
Capital: Prague
Population: 10 million
GDP 2012: \$202 billion
Currency: Czech Crown (CZK)
Language: Czech

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SUMMARY

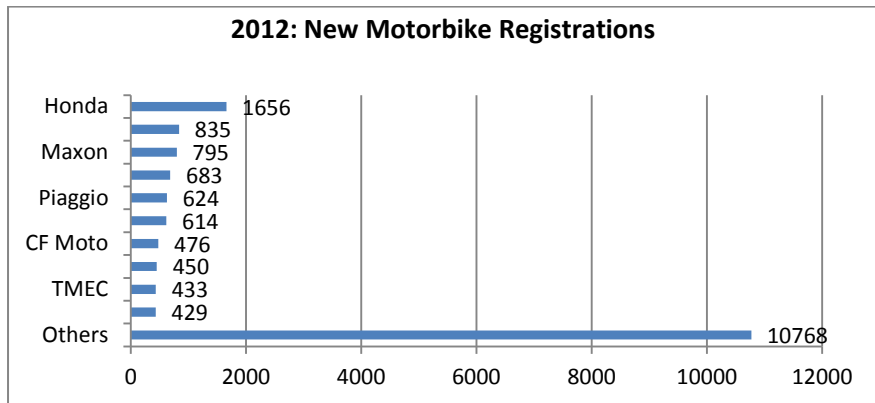
In 2012, there were 960,000 motorcycles registered in the Czech Republic in total. This included an additional 26,500 new motorcycles registered that year (2,300 locally produced, 12,900 new imports, and 11,200 used imports). While 74% of new sales in 2012 represented categories over 50 cubic centimeters, the vast majority of currently registered motorbikes and scooters are in categories up to 50 cc. In Jan–May 2013, 7,600 new and 5,500 used motorbikes were first registered in country.

The average age of motorbikes in use in the Czech Republic is approximately 32 years. The reason is that there are still many old JAWA motorbikes in use. JAWA was a dominant Central European motorbike manufacturer until the late 1980s, producing over 3 million motorbikes from 1929 to 1987. JAWA is still a Czech synonym for a reliable motorbike, though it lost its market position due to ineffective management during the late communist era. There are some small, skilled motorbike manufacturers in the country, but they focus more on top custom bikes primarily for export. On the very high end is the 240 hp, state-funded MIDALU, manufactured by Moto FGR with significant support of the Czech government. With its more than \$100,000 price tag, don't expect to see too many on the streets though.

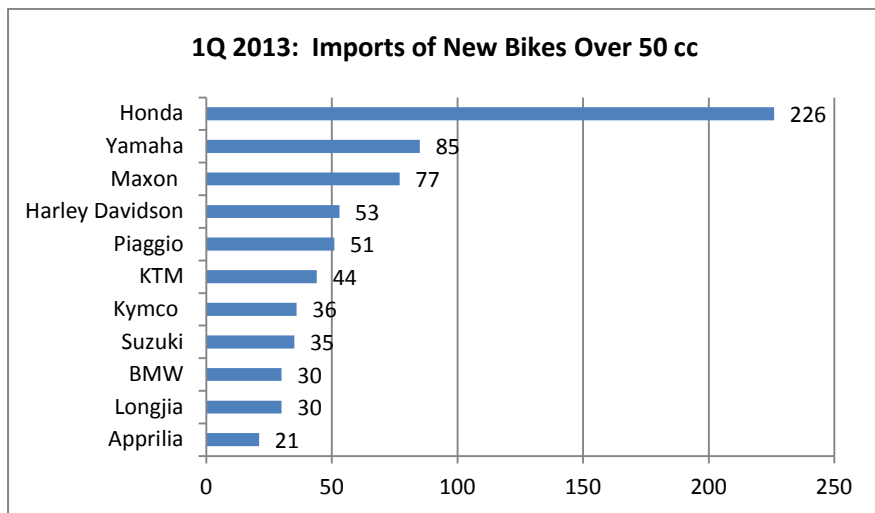


Registration data have been provided by the Automotive Industry Association (www.autosap.cz/)

There are more than 210 different motorbike manufacturers represented in the Czech market. Import data of the 10 most successful importers are below.



Import data provided by the Czech Car Importers Association (SDA-CIA, <http://portal.sda-cia.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, providing good opportunities for American exporters. Harley Davidson is undoubtedly the leader of the custom segment.

TRADE EVENTS

MOTOSALON 2014, March 2014, Prague

<http://www.bvv.cz/motosalon-gb>

The International Fair of Motorcycles, Motorcycle Accessories and Clothing organized by the BVV Trade Fairs Brno and the Car Importers Association.

MOTOCYKL 2014, March 2014, Prague

<http://www.motocykl-praha.cz/>

The 15th international exhibition of motorcycles, quad bikes and accessories and 7th international annual of custom bike exhibition, a part of the Official World championship of Custom Bike Building organized by AMD. Annually, the Motocykl Trade Show has taken place at the same time as its Motosalon competitor above.

RESOURCES & KEY CONTACTS

Automotive Industry Association of the Czech Republic

E-mail: autosap@autosap.cz, Web: www.autosap.cz

The ALA is a voluntary association of manufacturing, commercial and other companies which make up the Czech and Slovak automotive and allied industries. It covers almost the entire automotive sector with 161 members and 125,000 employees.

Car Importers Association

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

An association of official, exclusive, accredited importers of different vehicle makes.

EUROPEAN UNION



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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. In 2013, the Commission published its new Regulation 168/2013 to become mandatory as of December 31, 2015.

Motorcycles that fall within the scope of existing legislation require “type approval” which basically means that the whole motorcycle and its individual parts are subject to a pre-market procedure known as “type-approval.”

This report summarizes current requirements and also features an overview of the changes as a result of the adoption of the new Regulation.

1. Existing Directive 2002/24/EC <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:2002L0024:20081211:EN:PDF>

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 L5e)

The 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 at the end of this report). 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 28 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.

2. New Regulation 168/2013 (<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2013:060:0052:0128:EN:PDF>)

Regulation 168/2013, adopted in January 2013, covers approval and market surveillance of two- and three-wheel vehicles and quadricycles (quads). Other than the whole vehicle type approval, the Regulation also addresses type approval of systems, components and separate technical units, in line with the existing legislation. While this new Regulation is in force since March 22, 2013, it won't become effective until four delegated and one implementing acts have been developed to allow proper implementation of the new Regulation. These acts, covering functional safety, environmental performance, and vehicle construction as well as forms to be used to submit dossiers for type approval, should be available by end of 2014 (weblink for reports about ongoing work - https://circabc.europa.eu/faces/jsp/extension/wai/navigation/container.jsp?FormPrincipal:_idcl=FormPrincipal:_id4&FormPrincipal_SUBMIT=1&id=08880174-18dd-4b1e-80e4-20d488f64231&javax.faces.ViewState=rO0ABXVyABNbTGphdmEubGFuZy5PYmplY3Q7kM5YnxBzKWwCAAB4cAAAAAN0AAEEzcHQAky9qc3AvZXh0ZW5zaW9uL3dhaS9uYXZpZ2F0aW9uL2NvbhRhaW5lci5qc3A=).

In the meantime, motorcycles and their parts/systems can still be type-approved according to existing legislation to allow a gradual phase-in of the new requirements. The transition period, allowing the new Regulation and the existing Directive to co-exist, ends on December 31, 2015. At that point, Directive 2002/24/EC will be withdrawn.

KEY DIFFERENCES BETWEEN THE EXISTING 2002/24 AND NEW 168/2013:

General

The Directive became a Regulation which means that Member States have to implement the text as published in the Official Journal. Unlike the Directive, the Regulation should be considered a framework. The details – such as formats, requirements, etc., – will be adopted separately. While the manufacturer now has more choices and will be looking for information in different places, the general procedure/concept remains the same – manufacturers need to apply for type-approval prior to bringing two- and three-wheel vehicles on the EU market, as described above.

Motorcycle legislation now incorporates fundamental principles of EU single market legislation such as role of manufacturer, importer, distributor, authorized representative as

well as market surveillance and safeguards. These articles were added to ensure alignment with the New Legislative Framework, which addresses product safety in the single market. The emphasis is on traceability, which means that not only does the manufacturer's name have to be on the product, packaging or accompanying document, but also the name of the importer. Moreover, certificates of conformity, issued by the manufacturer upon receipt of type approval, will be numbered in the future, based on a new numbering system to be developed.

In addition, U.S. manufacturers need to appoint a single representative established in the EU to represent them with the approval authority and/or as a contact for market surveillance authorities.

As mentioned previously, between the time of writing this report and the end of 2014, the Commission intends to adopt a number of implementing measures such as specific requirements, templates to present required information for type approval requests, detailed arrangements regarding conformity of production, model of certificate of conformity, plate and markings, etc.

Scope and classification

The scope was clarified: by specifically mentioning travel of two- and three-wheel motorcycles on public roads, vehicles for off-road use are excluded. Enduro, trial and heavy all terrain quads are included in the scope whereas individual motorcycles are not covered. The general classification – ranging from L1e to L7e – remains unchanged, as follows:

- L1e light two-wheel powered vehicle
- L2e three wheel moped
- L3e two-wheel motorcycle
- L4e two-wheel motorcycle with side-car
- L5e powered tricycle
- L6e light quadricycle
- L7e heavy quadricycle

As with the existing directive, there are subcategories of vehicles. Annex I is helpful in determining categories based on additional criteria, such as mass, power, seating, etc. Mode of propulsion, such as electric engine, hybrid, or combustion engine, among others, is another element to allow proper classification.

The list of exclusions is longer in the new Regulation as follows:

- vehicles with a design speed not exceeding 6 km/h
- vehicles used in competition
- vehicles for physically handicapped
- vehicles for pedestrian control
- vehicles designed and constructed for use by the armed services, civil defense, fire services, forces responsible for maintaining public order and emergency medical services
- agricultural or forestry vehicles
- vehicles for off-road use and designed to travel on unpaved surfaces
- pedal cycles with pedal assistance with and auxiliary electric motor, maximum speed not exceeding 25 km/h, continuous rated power of less than 250 W, and motor is cut off when cyclist stops pedaling and is otherwise progressively reduced/cut off before the vehicle reaches 25 km/h.
- self-balancing vehicles

- vehicles not equipped with at least one seating position
- vehicles with any seating position in non-standardized height

Type approval stages

The manufacturer has several options when considering type approval.

- Step-by-step (collection of individual type approvals)
- Single-step type approval (a single approval process for the part or the whole vehicle)
- Mixed type approval (step-by-step without necessarily a type approval for the systems other than the whole type approval)

For certain types of vehicles, it is possible to handle type approval in multiple stages. For example, a typed approved commercial vehicle chassis to be equipped with a construction on top.

Unlike existing legislation, the format of the information folder to be submitted to the approval authorities for type approval is not listed in the Annexes. Templates for the new document and the folder still must be developed which is also applies to the test reports to be submitted for type approval.

Specific requirements which have to be met - such as noise testing or electrical safety - are listed in Annex II of the new Regulation. These requirements, in turn, refer to separate regulatory acts that describe the requirements in detail but readers will note the absence of reference numbers in the chart. The Commission intends to refer to UN Regulations where possible rather than develop its own separate regulatory acts. This work is ongoing.

Different type approval systems for innovative systems and small series

Innovative vehicles, systems, components or separate technical units can be subject to type Approval, which is based on a special exemption granted by the Commission through an implementing measure. This EU type approval will be limited to one country and limited in terms of length but it is possible for other Member States to accept the provisional EU type approval.

With regard to two- and three-wheel vehicles produced in limited quantities ('small series'), the Commission allows Members States to waive some of the requirements specified in this new Regulation. The practice currently exists but the numbers of small series exceptions have been reduced.

Other

Euro 5 engine emissions will be gradually phased-in to become mandatory for all types of vehicles as of 2020. The timeline may be subject to review, in light of scientific data and research findings as well as cost effectiveness, pending the outcome of a study due by the end of 2016.

Summing up

Manufacturers of two-and three-wheel motor vehicles, such as mopeds, motorcycles but also quads, have to apply for type approval prior to bringing their vehicles on the EU market. Compliance will be assessed against the current Directive 2002/24/EC until December 2015. As of December 2014, it will be possible to comply with new Regulation 168/2013, which will become mandatory on January 1, 2016. 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 of 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, Croatia, 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.

FINLAND



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

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SUMMARY

Finland is a northern European country with a population of about 5.3 million people. In addition to the small market size, the motorcycle and moped market is impacted by the large seasonal climate variation, with sales dipping in the winter months, and picking up in late spring and summer. April and May tend to see the distinctly largest numbers of new motorcycle and moped registrations.

The slowdown of the few recent years continued in the 2011-2012 period. The motorcycle market has been slowing owing to a dent in sales of motorcycles 750cc and over. The market was slow in 2011 partly due to difficulties related to importing from Japan, but general European demand has slowed down as well. Sales of lighter motorcycles and mopeds, however, have not suffered as much in recent years and there has been a consistent demand.

MARKED DEMAND

At yearend 2012, there were 243,479 registered motorcycles and 291,364 mopeds in Finland. A little less than 5,000 new motorcycles along with about 13,000 new mopeds were registered. The overall demand for both motorcycles and mopeds has declined over the last few years. The fastest growing private motor sector was snowmobiles with a growth of 21.6 per cent in number of registrations, bringing the total number of registered snowmobiles in Finland to 130,581 vehicles at year's end 2012.

Finland has no current motorcycle production of its own. The largest countries of motorcycle imports are Japan, United States, Italy and Germany. The most popular brands in 2012 were Yamaha, Honda, and KTM. Harley-Davidson, BMW and Kawasaki came behind with a small gap in registration numbers compared to the top three brands. Yamaha retained its top position from 2011, while Suzuki's position fell the most from 4th to 7th. BMW increased its share the most, although Honda, KTM and Harley Davidson each increased their sales numbers from 2011.

Yamaha remained the market leader in 2012, albeit with a slightly fallen market share of 16.2 per cent. Yamaha's share has seen some fluctuation, as it was approximately 20 per cent in 2011 and 11.5 per cent in 2010. KTM hit its record sales during the last quarter of 2012 with a 33 per cent increase in sales and reporting a 7.3 per cent market share in Europe.

In the moped market, the originally Finnish manufactured and now Chinese Solifer and Peugeot were market leaders in 2011, with Keeway, Derby and Yamaha following behind.

Currently the light motorcycle and moped market are doing well in the sector, while the demand for heavier motorcycles has been in a slow decline.

MARKET DATA

Finland - New motorcycle and moped registrations by month

Month	Motorcycles		Mopeds	
	2012	2011	2012	2011
January	94	90	244	238
February	106	161	578	481
March	388	315	1739	1320
April	1199	1377	2435	3787
May	1156	1372	2383	3754
June	726	862	1795	2851
July	538	670	1354	1781
August	375	444	1122	1502
September	183	275	685	882
October	97	94	463	452
November	100	51	133	235
December	32	25	68	120
Total for the year	4 994	5 736	12 999	17 403

Source: Finnish Transport Safety Agency (Traffic)

BEST PROSPECTS

Moped sales have remained the most popular option in 2012, and light motorcycles are also in demand. Categorized within moped sales, the demand for micro cars has also been strong. Due to Finland's cold winter weather conditions, the sales of mopeds and motorcycles are concentrated in spring, summer and early fall.

MARKET ENTRY

Mopeds are free of automobile taxation in Finland, but motorcycles are taxed 9.8 – 24.4 percent 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 top speed exceeds 45 km/hour (approx. 28mph). 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

In 2014, the following major motorcycle fair is organized in Finland:

MP 14 Electric Motor Show

January 31st – February 2nd 2014

Location: Helsinki Fair & Convention Center

The largest motorcycle fair in the Nordic region, the MP 14 fair is an opportunity to get to know the 2014 models from brands such as Yamaha, Honda, KTM, Harley-Davidson, BMW, Kawasaki, Suzuki, Triumph, Piaggio, Husqvarna, Aprilia, Ducati and Victory. The MP 14 show covers everything from motorcycles, mopeds, scooters, off-road vehicles, motorized micro cars and tricycles, biking gear, spare parts, supplies and building, motorcycle travel and other related products and services.

<http://www.messukeskus.com/Sites1/MP/en/Pages/default.aspx>

RESOURCES & KEY CONTACTS

<http://www.trafi.fi/en/> - Finnish Transport Safety Agency

<http://tekninen.fi/yhdistys/jaostot/moottoripyoeraejaosto> - The Association of Finnish Technical Traders: Motorcycle Department

<http://www.mpkauppiaat.fi/Etusivu.html> - Motorcycle Traders Association

FOR MORE INFORMATION

The U.S. Commercial Service in Helsinki, Finland can be contacted via e-mail at:

mia.maki@trade.gov;

Phone: (+358) 9 6162 5140 or by visiting our website at: www.buyusa.gov/finland/en.

FRANCE



Capital: Paris
 Population: 65.8 million
 GDP 2012: \$2.5 trillion
 Currency: Euro (EUR)
 Language: French

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U.S. Commercial Service Paris
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 Commercial Specialist
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SUMMARY

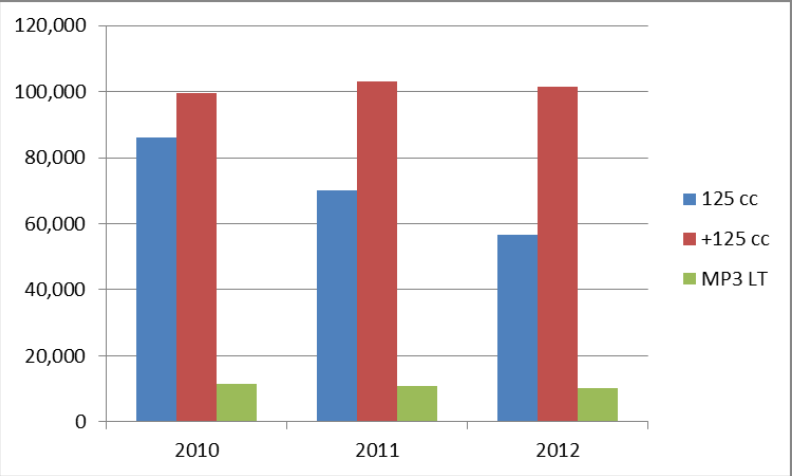
France is the fourth largest producer of Powered Two Wheel (PTW) vehicles in Europe after Italy, Germany and Spain. Production in 2011 reached 74,359 units (a decrease of 24% compared with 2010), or about 9.7% of European output (767,593 units). Additionally, France ranks fourth in the number of motorcycles on the road in Europe at 3,439,417 in 2011 (1,591,636 million mopeds under 50cc and 1,847,781 million motorcycles over 50cc), after Italy, Germany and Spain. In 2012, nearly 1,538,000 PTWs, were sold in the European Union compared to 1,762,450 vehicles sold in 2011, accounting for a 12.7% decline year-to-year.

Among the large markets, Italy reported the greatest loss with a 22% decline in sales, followed by Spain with a decline of 19%. France however, managed to keep the losses above the EU average at 10.6%, where the largest drop concerned PTWs under 125 cc. Germany and the United Kingdom suffered minor decreases in sales of 3.4% and 0.1%, respectively.

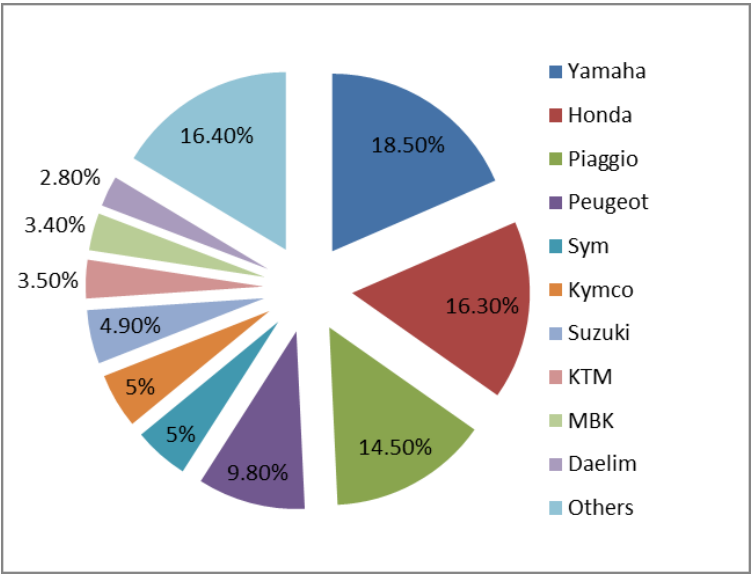
Despite its negative impact on the motorcycle market, the economic crisis highlighted the benefits of urban oriented PTWs which represent 59% of overall sales. A split by cylinder capacity shows that 46% of scooters belong to the moped segment (<50cc), 31% are light motorcycles (125cc), while 23% of scooters are PTW over 125cc. Access to these vehicles is contingent upon driving license categories which determine minimum driving age, and limitations to engine size and power. In many EU countries, car drivers are permitted to use light weight motorcycles (125cc) due to the equivalence of their driving license (type B). (Source: ACEM The motorcycle industry in Europe)

In terms of sales, France is the third largest market in Europe, with 168,801 motorcycles and scooters sold in 2012, of which 56,753 were vehicles less than 125cc, 101,353 were over 125cc and 10,095 were tricycle motorbikes (MP3 LT). (Source: Moto-net.com)

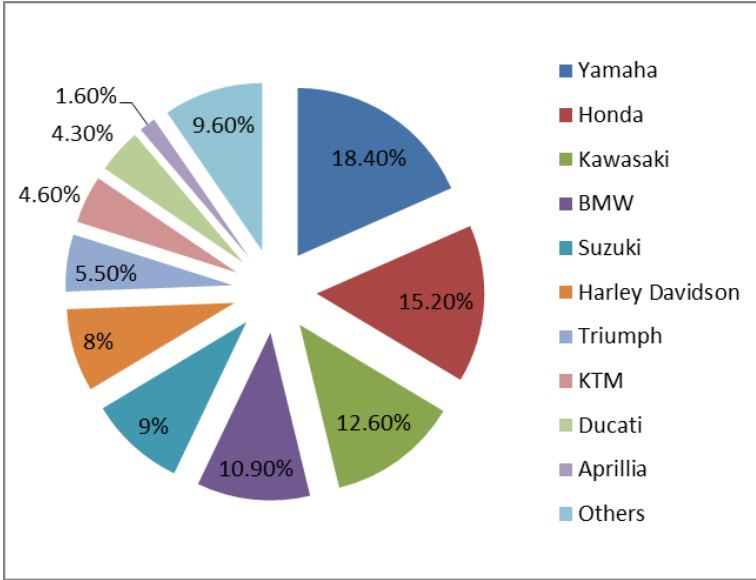
2010-2012 Annual French Sales of Power Two-Wheelers (units)



2012 Market Share in France for 125 cc



2012 Market Share in France for +125 cc



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

Top 10 models Sold in France in 2012

BRANDS	MODELS	Cc Class	Types
PIAGGIO	ZIP 50 2T	2-50c	Moped
PIAGGIO	MP3 500 LT	251-500cc	Tricycle
MBK	BOS50SPI	2-50cc	Moped
YAMAHA	XMAX 125	51-125cc	Motorcycle
KYMCO	AGILITY 50	2-50cc	Moped
PEUGEOT	LUDIX 50	2-50cc	Moped
PEUGEOT	KISBEE 50	2-50cc	Moped
YAMAHA	TMAX (530cc)	251-500cc	Motorcycle
VESPA	LX 50	2-50cc	Moped
HONDA	CB600F/A	501-750cc	motorcycle

IMPORT/EXPORT

France imports most of its motorcycles/scooters/mopeds from Italy and Japan for both <125 cc and >125 cc motorcycles. Japanese brands for 125 cc and > 125 cc units represent approximately 50% of motorbike registrations. Other motorcycles are primarily imported from other Western European countries, especially Germany and Austria.

Despite an 8% decrease in 2012 over 2011, Harley Davidson is registered as the 5th foreign brand sold in France for >125 cc motorcycles with 8,066 units sold in 2012.

COMPETITION

Italy is by far the largest producer of motorcycles in Europe, followed by Germany and Spain. Like Italy, Spain, and Germany, the production of motorcycles in France 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 is heavily reliant on imports, primarily from European countries.

The motorbikes and bikers accessories market, through traditional distribution channels, had estimated sales between 500 to 600 million euros in 2011, while the motorbikes and bikers accessories sales via the Internet reached 31 billion euros. 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.

To be able to compete with European motorbikes and bikers accessories manufacturers, U.S. manufacturers should consider building inventory in warehousing facilities based in Europe. Most French distributors of this category of product typically make sales through the Internet, requiring inventory availability in Europe to avoid international transportation and customs costs.

BEST PROSPECTS

The French are particularly interested in scooters, and demand is higher than for its European neighbors. Accordingly, there may be opportunity for U.S. scooter manufacturers to partner with European entities, as there are few U.S. brands with a strong presence in the market. Additionally, U.S. companies will find export opportunities in the motorcycle/scooter accessories market for both the vehicle and rider.

TRADE EVENTS

*Salon de la Moto, Paris International Two-Wheel Show, December 3-8, 2013
<http://www.lesalondelamoto.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/

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

GERMANY



Capital: Berlin
Population: 80.2 million
GDP 2012: \$3,268 billion
Currency: Euro (EUR)
Language: German

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SUMMARY

There were about 33 million PTWs (Powered Two Wheelers) registered in the 27 EU member states in 2012, according to the Association of European Manufacturers of Motorcycles (ACEM), of which about 67 % are motorcycles. In 2008, ACEM forecasted an increase to 37 million by 2020. The countries with the highest number of new PTW registrations in 2012 were France (286,761), Italy (257,779), and Germany (178,259). Overall, market performance in Europe has been negative for the past 10 year and sales in Europe were almost cut in half between 2008 (2.7 million) and 2012 (1.5 million).

In comparison to the European PTW market (here the EU market is defined as the 27 EU member states, plus three associated markets in Turkey, Croatia, and Macedonia), the German motorcycle industry performed well in 2012. New registrations in the EU fell by 13.3% from 2011 to 2012 but it is worth noting the structural differences between southern and northern European countries. Markets in most southern European countries continue being depressed, which is reflected in respective motorcycle registrations, e.g. in Greece (-40%), Italy (-31.6%), and Spain (-19.2%). Markets in Germany (+0.47%), Austria (+8.8%), Norway (+4.3%), and Great Britain (+1.6%) on the other hand produced positive results in 2012.

MARKET DATA

In 2012, the total number of new registrations of motorcycles (excluding light motorcycles and scooters) in Germany increased by approx. 0.5% to a total of 127,680 bikes. Although still far away from its peak years, sales numbers for vehicles subject to registration in Germany ($\geq 80\text{ccm}$) are robust. Whereas sales of larger motorcycles have been increasing slightly, registrations of light motorcycles and scooters are currently on a downward trend.

Germany's leading motorcycle trade fair, INTERMOT, recorded a record number of both new model releases and visitors in 2012. The robust condition of the German market is one reason why many international companies increasingly target biannual INTERMOT trade fair in Cologne to present new models and products to leading European motorcycle markets.

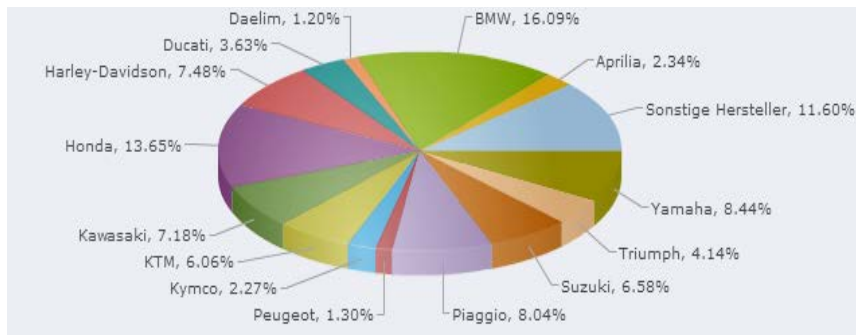
Demand for motorcycles within higher cc-classes is still increasing. The most popular models are larger touring bikes (enduros, sport bikes, and all-rounders), such as the BMW R 1200 GS, which remains the no. 1 model in Germany. Particularly for young adults,

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 and increasingly congested cities with extremely limited and restricted parking space.

Market Share of Motorcycles ($\geq 80\text{cm}^3$) according to Market Segment, 2012		
Market Segment	Market Share %	Change 2011 - 2012 %
Sport	35.26	+2.68
Enduro	27.16	+11.07
Chopper	12.84	+8.06
Classic	10.68	-2.43
Supersport	8.15	-10.93
Touring bike/ luxury tourer	4.54	-19.15
Others	1.37	+4.36

KEY SUPPLIERS AND MODELS

BMW remains market leader (16.09%) in 2012 in Germany for all classes, followed by Honda (13.65%), Yamaha (8.44%), Piaggio (8.04%) and Harley-Davidson (7.48%). Within the larger motorcycles segment, BMW's market share increases even to 23.16%.



Harley-Davidson still enjoys a cult status with Germans of all ages. It is trendy for lawyers, dentists, bankers and young urban professionals to own a Harley. For a number of years Harley-Davidson has increased its market share, despite a negative overall market trend.

1	BMW	R 1200 GS	6.641
2	Kawasaki	ER-6n	2.445
3	BMW	F 800 GS	1.791
4	BMW	F 800 R	1.704
5	BMW	S 1000 RR	1.676
6	BMW	R 1200 R	1.663
7	Yamaha	XJ6	1.654
8	Honda	NC 700 X	1.561
9	Honda	NC 700 S	1.536
10	Harley-Davidson	XL 1200 X	1.223

New registrations 2012, TOP motorcycle models by manufacturer

MARKET ENTRY

Any motor vehicle model to be operated on public streets in Germany has to be approved by a federally accredited institution (e.g. 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

There is a general trend regarding the German biker community: as bikers are getting fewer, the community is also getting older, while spending per biker is increasing. The PTW industry often stressed the need for a revision of existing EU motorcycle license regulation to address the decreasing number of new and young bikers. In 2013, a revised EU legislation came into effect, intending to further harmonize license legislation among its member states. The need for lower entry barriers for new riders was addressed, allowing for more flexibility for beginners but also returners and experienced riders. Despite increased flexibility, the revised classes still include limitations for young bikers, such as a power/weight ratio for young riders. This legislative environment explains why manufacturers are producing a range of models in different cc- and KW-classes – e.g. in 2013, Yamaha offers 67 different models across all segments. Please contact Industry Specialist Felix Happe (Felix.Happe@trade.gov) in Frankfurt/Germany if you are interested in further details.

OUTLOOK

In 2011, the EU published a White Paper on Transport, stressing and demanding a drastic reduction of greenhouse gas emissions (including specific targets) and a roadmap for future mobility and respective infrastructure. The WP stresses a need for competitive, individual and sustainable mobility. Analysis and studies already strongly suggest that, due to their intrinsic characteristics, especially electric PTWs (i.e. mopeds, scooters, motorcycles, tricycles and quadricycles) have great potential to reach these goals. A growing EU EV market, whilst still marginal, represents already today nearly 1.3% of EU PTW sales – which as such is much higher than for cars. Due to its constant growth over the last few years, market potential for this segment exists within an otherwise rather gloomy EU market.

RESOURCES & KEY CONTACTS

Industry Association:

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.

Media:

Motor Presse Stuttgart GmbH & Co. KG. Magazine: Motorrad, www.motorradonline.de

MO Medien Verlag. Magazine: Motorradmagazin MO, www.mo-web.de

Vogel Business Media GmbH & Co. KG. Magazine: bike und business, <http://www.bikeundbusiness.de/>

Reiner H. Nitschke Verlags GmbH. Magazines: Tourenfahrer, Motorrad Fahrer, Motorrad Abenteurer, <http://www.nitschke-verlag.de/>

Triple Verlag GmbH. Magazine: Cross Magazine, www.crossmagazine.de

Factory Media GmbH . Magazine: MotoX, <http://motoxmag.mpora.de/>

GREECE



Capital: Athens
 Population: 10.82 million
 GDP 2012: \$251.9 billion
 Currency: Euro (EUR)
 Language: Greek

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SUMMARY

Motorcycles in Greece are mostly seen as a means of transportation and less as a sporting good. Many Greek commuters prefer motorcycles to cars because they offer ease in traveling through tight traffic and can be acquired and operated at a significantly lower budget. Bicycles are becoming more and more popular, but do not present an alternative for commuting because most Greek towns and other residential areas have fairly steep hills. Greece's weather makes it feasible to use motorcycles for most periods throughout the year. A number of businesses such as couriers, food and other delivery companies, law enforcement agencies and even emergency health professionals resort to the use of motorcycles. As for motorcycle rentals, they are a popular business in many tourist destinations, especially islands. Indeed, the distribution of new registrations below shows that the highest numbers are observed from April through September.

NEW MOTORCYCLE REGISTRATIONS BY MONTH													
YEAR	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
2009	4252	4020	4089	5264	8436	9956	10750	6575	6178	4841	3421	3884	71666
2010	3924	2844	4916	6121	7527	8285	8243	5284	5350	4151	3096	2157	61898
2011	3304	2629	3148	4232	5584	5948	6719	4555	4482	2830	2048	1136	46615
2012	2036	1207	2271	3188	4202	3832	4855	3247	2807	2884	1594	761	32884
2013	1821	1573	1799	3114	-	-	-	-	-	-	-	-	8307

In 2013, the motorcycle market continued its downward trend. During the first quarter, 8,307 motorcycles have been registered compared to 8,702 in the same period last year, suggesting a drop of 4.5%.

MOTORCYCLE REGISTRATIONS BY TERRITORY						
YEAR	ATHENS	SALONICA	EPIRUS	THESSALY	THRACE	CRETE
2009	30339	6160	1700	3613	2166	5687
2010	26994	4307	1464	3382	1573	4933
2011	20853	3105	1042	2353	1304	3446
2012	14677	1877	684	1581	925	2880

MOTORCYCLE REGISTRATIONS BY TERRITORY					
YEAR	MACEDONIA	AEGEAN ISLANDS	IONIAN ISLANDS	PELOPON.	CENTRAL GR.
2009	4423	5807	2014	6588	2919
2010	3412	5067	1705	5770	3291
2011	2366	4409	1458	4370	1909
2012	1561	2927	997	3097	1578

BEST PROSPECTS

Another popular way to get around is by moped. mopeds are low-powered motorcycles equipped with engines ranging from 50 to 125 cc and a maximum speed of 45 km (28 miles) per hour. Certain three and four wheel vehicles are classified as mopeds as long as their weight does not exceed 350 kg (770 lbs.) Compared to motorcycles, mopeds pay lower annual road tax, lower insurance premiums, lower tolls, and require a simpler type of driving license that can also be issued to young people (17 and above with parental consent).

MOTORCYCLE ROAD TAX	
ENGINE CAPACITY	ROAD TAX
50 cc and below	-
51 to 300 cc	22 euros
301 to 785 cc	55 euros
786 to 1071 cc	120 euros
1072 to 1357 cc	135 euros
1358 to 1548 cc	240 euros
1549 to 1738 cc	265 euros
1739 to 1928 cc	300 euros
1929 to 2357 cc	660 euros
2358 to 3000 cc	880 euros
3001 to 4000 cc	1100 euros
4001 cc and above	1320 euros

*Vehicles up to 50 cc (i.e. mopeds, scooters) incur no road tax.

MARET ISSUES & OBSTACLES

Licenses

Starting from January 19th 3 there are four motorcycle licenses (A, A1, A2, AM). The new subcategory for mopeds (AM) requires the applicant to be over 17 years of age while in EU the corresponding age limitation is 16 with parental consent.

Two years after the issuing of an A1 motorcycle license (up to 25 kW or a power to weight ratio of up to 0.16 kW) its holder may drive motorcycles of any power or any power to weight ratio.

It takes a motorcycle license (category A) to drive legally MP3 LT or Quadro, even though in the past driving three wheel vehicles required a B1 license. Small ATVs (light four wheel vehicles with a maximum speed of 45 km per hour and a maximum weight of 350 kg) may be driven with an A or an AM license, while larger ATVs continue to require a car license (category B).

TECHNICAL CONTROL (KTEO)

The technical control of the various vehicle categories in Greece is performed by public and private VTCCs (Vehicle Technical Control Centers).

Excluded from such control are motorcycles under 50 cc, three wheel and four wheel vehicles. Vehicles are brought in for control in accordance with the date of issue of the first license. If control is overdue by a week to a month, owners are obliged to pay a 10€ fine in the form of deposit slip. Similarly, if control exceeds the deadline by one to six months the fine is 20€ and if over six months the fine is 41€.

At the end of technical control and once the vehicle's conformity has been established, VTCCs issue a Technical Control Card (TCC) which is valid for two years and an Exhaust Control Card (ECC) that needs to be renewed on an annual basis. The average cost of technical control for motorcycles is 30€.

Technical control is compulsory and vehicles driving without a Technical Control Card are subject to a 400€ fine, though if they go through technical control and submit their TCC within 10 days the fine is reduced to 50€.

MEDIA

[MOTO magazine](#) [Moto Tritt](#) [MOTOGP WORLD](#) [CAM magazine](#) [Biker Spirit](#)
[Bikelt](#)
e-go.gr/wheels+motors [motorsite.gr](#) [MotoXtreme](#)

TRADE EVENTS

[FIM Enduro World Championship 2013](#), sixth round, Kastoria, June 21-23.
[Rally Pro Series Championship 2013](#), second round, Serres, August 26-31.
[Athens Moto Festival 2013](#)
[Classic Trophy 2013](#)
[National Motocross Championship 2013](#), seven-round series for MX1, MX2 and Quads.
[Circuit Cup 2013](#)
[National Dragster Championship 2013](#), six-round series for Scooters, Vespas and Ducks.
[National Speed Racing Championship 2013](#)

RESOURCES & KEY CONTACTS

[Association of Motor Vehicle Importers Representatives](#)
[Ministry of Infrastructure, Transport and Networks](#)
[Motorcycle Consumers Association](#)
[Hellenic Motorcycle Federation](#)

HUNGARY



Capital: Budapest
 Population: 9.9 million
 GDP: \$210 billion
 Currency: Hungarian Forint (HUF)
 Language: Hungarian

Contact:

U.S. Commercial Service Budapest

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SUMMARY

In 2012, close to 145,000 motorcycles were registered in Hungary. The majority of registered motorbikes and scooters are in the category below 50 cm³. The average age of the motorbikes is 18-25 years. Motorbike sales in Hungary have still been on decline since 2008. In 2012 only 2,519 new motorbikes were sold, the Hungarian Vehicle Importers Association (AHAI) forecast total sales of 2,630 new motorcycles for 2013. Scooters or mopeds (50 cm³ 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. There are still a lot of former Central-Eastern European brands in use such as JAWA, Simson and Pannonia and they still represent favorite brands in less urban areas in Hungary.

In March 2012, only 250 new motorcycles were sold compared to 315 sold in April 2011. In 2012 a total of 9,754 new and used motorbikes were registered. The peak years for motorcycle sales were 2004 through 2006 when more than 18,000 motorcycles and scooters were sold annually. Motorcycle sales show somehow 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 Association of Hungarian Automotive Industry (AHAI), the registration tax levied on automobiles and motorbikes introduced in January 2007 had a significant negative impact on motorcycle sales figures. Until the introduction of this tax, motorbikes over 250 cm³ were popular, but since the introduction of the tax, demand for 50 to 125 cm³ vehicles increased. For large engine motorbikes, the registration tax can be around 25-30 percent of the retail price of the vehicle.

Presently, there is no domestic production of motorbikes in Hungary. 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.

Motorbikes	Unit	2009	2010	2011	2012
Average Age of Motorbikes	Years	15.4	16.1	15.9	16.2
Number of Motorbikes Used on Roads in Hungary	Units	140,210	139,560	139,720	144,820

Source: Hungarian Statistical Office on-line database

BEST PROSPECTS

The leading state-of-art motorbike brand in Hungary is Honda. The following other brands of motorbikes are also popular among Hungarian motorbike fans: Aprilia, BMW, Ducati, Harley-Davidson, Kawasaki, KTM, Malaguti, Pannonia, Piaggio, Suzuki and Yamaha.

Leading motorbike brands and cubic centimeters:

Honda - 402
Yamaha - 171
Keeway - 155
Adams - 151
Suzuki - 135
Kawasaki - 111
Motorro - 104
Yuki - 103
Vespa - 69
Kymco – 66

Number of Motorbikes until 50 cm3: 919
Between 51–125 cm3: 359
Between 501–810 cm3: 350
Above 801 cm3: 316
Quads: 207
Between 126–350 cm3: 154
Between 351–500 cm3: 47

Parts for customizing motorbikes, protective clothing and helmets are selling well in the market. Motorbike enthusiasts usually request the highest quality parts and accessories, providing good opportunities for American exporters. Harley Davidson is undoubtedly the leader of the custom segment.

TRADE EVENTS

International Auto, Motor and Tuning Show, March 22-24, 2013, Hungexpo - Budapest
www.amts.hu

RESOURCES & KEY CONTACTS

Association of Hungarian Automotive Industry - www.ahai.hu
An association of official, exclusive, accredited importers of different vehicle makes.

ISRAEL



Capital: Jerusalem
 Population: 8 million
 GDP: >\$30,000
 Currency: Shekel (ILS)
 Language: Hebrew,
 Arabic

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SUMMARY

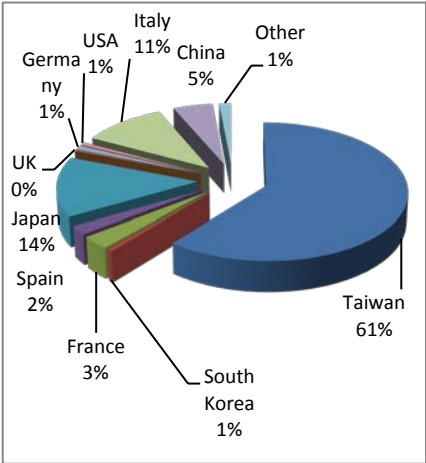
In the past decade, the Government of Israel has been unsuccessful in establishing an efficient mass transit system in order to reduce the dependency on private vehicles as the major mode of transportation, and to alleviate the massive traffic congestions on intercity roads. Commute distances between Israel's three major cities (Tel Aviv, Jerusalem and Haifa) range between 60km to 95km, and approximately 35 km from and around the greater Tel Aviv metropolitan area to downtown. Unfortunately, most of the major national transportation infrastructure projects undertaken are way behind budget and deadline. In the meantime, Israelis have turned to two-wheel vehicles in an effort to beat the congestion in and around the main cities.

In 2012 there were 119,000 motorcycles in Israel, of which, 62% are from Taiwan. Average age 4.6 years. The market remained flat year-on-year. The 125cc group is the most important market segment in Israel, comprising about 54% of the entire two wheel market, and the 250cc group about 30%. The 100cc and 200cc groups are generally unpopular in Israel as is the 300cc scooter. Israeli consumers are unwilling to compromise on quality and are very cost conscience.

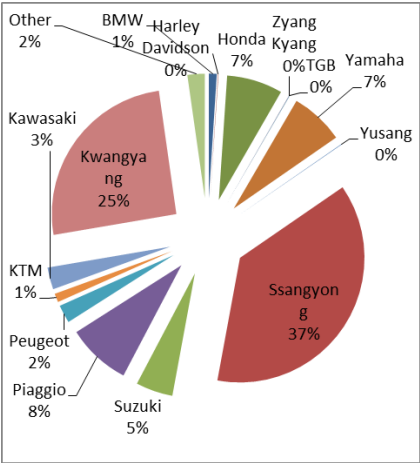
Market size (new registrations) by displacement (Motorcycles and Scooters over 50cc)

Registration data by market segments: 2011 vs 2012					
CC	1-10/2009	Market share	1-10/2010	Market share	CHANGE%
50	133	0.9%	186	1.3%	39.85
51-125	7,699	51.4%	7,614	51.4%	-1.10
126-250	4,734	31.6%	4,416	29.1%	-6.72
251-500	1,470	9.8%	1,455	9.8%	-1.02
501-750	477	3.2%	677	4.6%	41.93
750+	419	2.8%	354	2.4%	-15.51
Electric	61	0.4%	100	0.7%	63.93
Total	14,993	100%	14,802	100%	-1.27

Source: Motorcycle Registrations in Israel, 2011-2012- Source: Central Bureau of Statistics



Market Share by Country of Origin



Market Share by Brand

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 the 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.

Tax	Category			
	*1		*2	
	Origin EEC & U.S.A. %	Origin others %	Origin EEC & U.S.A. %	Origin others %
Customs	0	7	0	7
Purchase tax	40	40	72	72
V.A.T.	16	16	16	16
Total:	62	74	100	113

IMPORT DUTIES

*1 MOTORCYCLES UP TO 125CC AND 11 KW SCOOTERS
*2 MOTORCYCLES OVER 125CC AND 11 KW (Import duties are paid on landed cost)

Moreover, importers at their own expense, have to set up bonded warehouses, provide PDI 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 to supply the spare parts must within 7 days in the case that the vehicle cannot run without the parts.

Establishing a national sales and service network and sustaining it, requires high sales volumes which is why the two major players 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 the importers of Ducati and Harley Davidson do not maintain a national network of dealers as they only sell small numbers of units per year. There are a number of auto vehicle distributors that double-up by marketing two wheel vehicles as well through their existing network of vehicle dealerships and service stations. For example, Honda- KTM, Peugeot and Citroen-Polaris ORVs and BMW- Husqvarna.

OPPORTUNITIES FOR U.S. EXPORTERS

Mainly off road motorcycles and ATVs and electric scooters and motorcycles.

SERVICES OFFERED BY THE U.S. COMMERCIAL SERVICE IN ISRAEL

The U.S. Commercial Service offers a wide range of services to American companies wishing to enter the Israeli market or to strengthen their position there. For more information please contact Commercial Specialist, Alan Wielunski by email: alan.wielunski@trade.gov

ITALY



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

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SUMMARY

Italy is the second largest European markets for new motorcycles and mopeds, with almost 258,000 new registrations in 2012, (-22% compared to 2011).

Italy is the largest European market for motorcycles (over 50cm³). 206,000 motorcycles were sold in 2012.

There is also a significant market for used motorcycles: in 2012 around 530,000 vehicles changed ownership.

Italy is the leading manufacturer of motorized 2-wheel vehicles in Europe. Production in 2011 was 414,000 vehicles, more than half of the European output.

The country has the largest number of motorcycles on the road in Europe: 8.6 million vehicles in 2011 (2.17million under 50cm³ and 6.44 million over 50cm³).

This opens up opportunities for those manufacturers offering products needed for diagnostics, as well as vehicles' care.

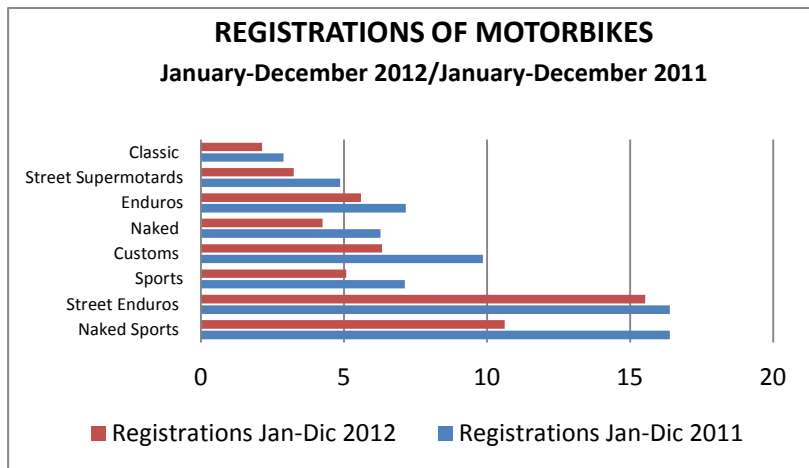
The niche of the electric and hybrid vehicles, with a growth of 43% over 2011, was one of the few to increase. The 1,093 vehicles registered in 2012 proved to be a success because their sales increased by 300 units over 2011. It is expected that this growth will continue also in 2013.

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

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 2013 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.



The Customizing sector

The Customizing sector ended 2012 with a market share of 10.7%, third overall behind Street Enduro and Sports Naked. In absolute values, registered units decreased from 9,852 in 2011 to 6,329 in 2012. Of the 6,329 Custom units registered in 2012, 69% were Harley-Davidson. In the Top20 by segment we find first the Harley-Davidson XL1200X Forty-Eight (868 units), followed by Harley-Davidson XL883N (812 units). In this sector, U.S. products are particularly rated by Italian customers due to their quality, design and high-tech content.

The 'Green' Market

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 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.

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.

Now in its fifth edition, it is an international showcase specially designed to present all the latest alternatives to the vehicles running on traditional fuels and to emphasize the benefits associated with electric traction. 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.

TRADE EVENTS

The U.S. Department of Commerce-certified EICMA 2013, the major global motorcycle, scooter, moped and accessories trade show, takes place November 5-10, 2013, in Milan. See: www.buyusa.gov/italy/en/eicma2011.html.

Motor Bike Expo Show 2014, January 24-26, 2014, Verona, (special motorcycles, custom and accessories), www.motorbikeexpo.it/inglese/

Moto Dealernews Expo 2014, February 2014 (dates TBD), Milan (A B2B event for manufacturers, importers and dealers), www.motodealernewsexpo.it

Motodays 2014 (motorcycle / scooters / mopeds), March 6-8, 2014, Rome, www.motodays.it

EICMA 2014 (motorcycle / scooters / mopeds), November 11-16, 2014, 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.

Media

Motociclismo, www.motociclismo.it

Dueruote, www.dueruote.it

Moto Dealer News, www.motodealernews.it

NETHERLANDS



Capital: The Hague
 Population: 16.8 million
 GDP 2012: \$710 billion
 Currency: Euro (EUR)
 Language: Dutch

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SUMMARY

Overall sales of motorcycles and mopeds declined in 2012. As a result of the economic crisis, mopeds have become a more accepted form of transportation for short and medium distances. In 2012, interest groups started to encourage greater use of two-wheeled transportation, but they would like more political support from the Dutch government.

MOPED AND MOTORIZED BICYCLES

There are approximately 1.1 million mopeds and 712,417 motorcycles on the Dutch market in 2012. Sales of new motorcycles came to 10,093 while sales of used motorcycles amounted to 120,000 units.

Sales 2012	Number	Δ 2011
Mopeds	68,783	-38.7%
Motorcycles	10,093	-6.7%

Motorcycles enter the Dutch market through approximately 20 importers of foreign brands, which have their own dealership networks. There are approximately 350 motorcycle dealers in the Netherlands. A number of these dealerships, such as BMW and Harley-Davidson, work with exclusive dealerships or select dealership that only represent their brand. Most dealers sell both used and new motorcycles. Traditionally, genuine parts are used for maintenance and repair. Throughout the years, there has been a notable increase in aftermarket parts. Helmets, accessories, and apparel have become important sources of income to motor dealerships.

Mopeds are sold at approximately 400 retail stores throughout the Netherlands. These stores have little brand or product specialization. The purchase of mopeds goes through importers or specialized wholesalers. Due to the strong price competition and smaller margins, this sector is expected to undergo a major restructuring in the near future.

TRENDS

Driven in part by the economic recession, consumer preference has changed considerably. The scooter or moped is chosen with increased frequency over a car for short and medium-range distances. The motorcycle is starting to compete more with cars in terms of cost and accessibility. Despite the growing demand in this sector, government policy remains unchanged. Interest groups, including the automotive vehicle industry association, are

propagating the use of two-wheeled transportation within city limits. This would include special moped lanes next to bicycle lanes and designated parking areas. Interest groups and the Dutch government continue a dialogue to develop a vision for two-wheeled mobility for 2014-2015.

Electric mopeds remain popular. The number of electric mopeds on the road grew from 2,000 in 2008 to 20,298 in 2012.

Experts are concerned about an increase in products of questionable quality that are entering the market. This includes motorcycles, mopeds and aftermarket products, such as parts and accessories.

Although the sector is struggling at the moment, there are reasons to be optimistic:

- The European Commission stated that motorized two-wheelers can offer a substantial contribution to mobility needs in the near future. This might drive growth in the sector.
- An increasing number of consumer views motorized two-wheelers as an acceptable, functional and adult mode of transportation in addition to a bike, car or public transportation.

The Framework Regulations, published in October 2010, offers manufacturers the opportunity to continue to develop durable products.

COMPETITION

The best sold moped brands in 2012 were Piaggio, SYM, and Kymco. Although Japanese brands were market leaders in the Netherlands for years, BMW took the lead in 2010. It was also the leading sales brand in 2012, followed by Honda and Suzuki.

Sales 2012	Number
Piaggio	16,014
SYM	8,633
Kymco	6,846

Sales 2012	Number
BMW	1,710
Honda	1,540
Suzuki	1,116

BEST PROSPECTS

Parts for customizing motorbikes, protective clothing, and helmets continue to be the best sellers in the market.

TRADE EVENTS

Motorbeurs Utrecht, February 20-23, 2014, <http://www.motorbeursutrecht.nl/en>

RESOURCES & KEY CONTACTS

Association

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

SLOVAK REPUBLIC



Capital: Bratislava
 Population: 5.43 million
 GDP 2012: \$93 billion
 Currency: Euro (EUR)
 Language: Slovakian

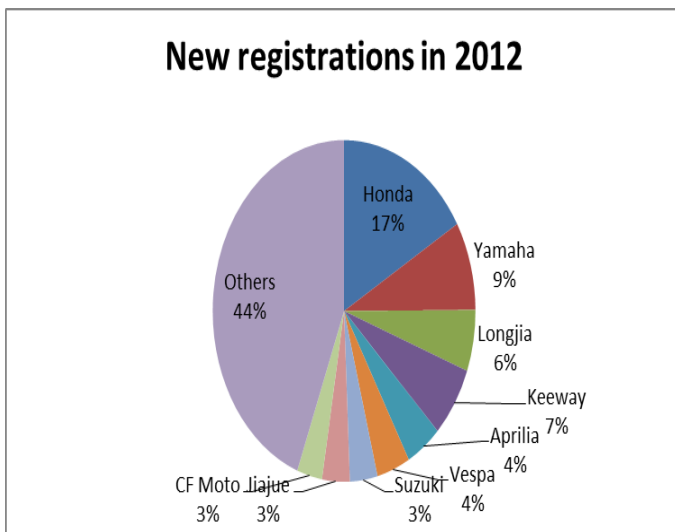
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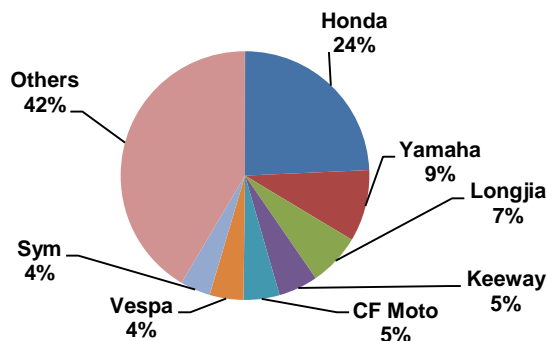
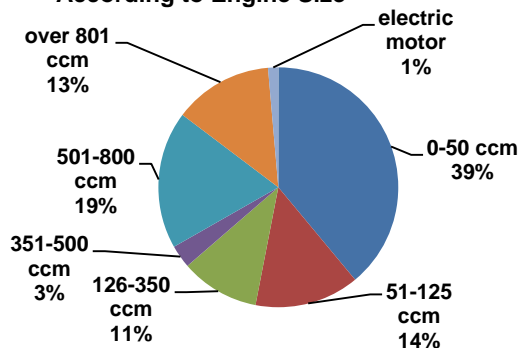
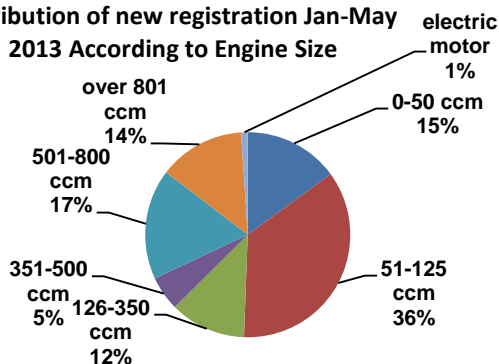
SUMMARY

In 2012 there were 104,802 motorbikes registered in the Slovak Republic, of which 3,791 were new registrations. The vast majority (39%) of registered motorbikes and scooters are vehicles of 50 cubic centimeters (ccm) engine capacity, followed by motorbikes and scooters with engines up to 125 ccm.

There is no domestic motorcycle production. The top three market players in the course of last year were: Honda 17%, Yamaha 9% and Longjia 6%. The other big players are Keeway, Aprilia and Vespa. Another over 40 motorcycle brands shared less than four percent of the Slovak market.

Even though motorcycle registration is obligatory according to the Slovak law, unregistered ORSs and ATVs are driven at competitions or in the countryside.



New registrations January-May 2013**Distribution of new registration in 2012
According to Engine Size****Distribution of new registration Jan-May
2013 According to Engine Size**

New registrations of the only U.S. motorcycles in Slovakia – Harley Davidson - are increasing. From 2.6% market share in 2012 Harley climbed to 3.2% in April 2013 and is still on rise. Being in the category of motorcycles with engines over 801 ccm, without a doubt Harley Davidson is the leader of the custom segment.

As of May 1, 2013 anyone with a class B driving license is allowed to drive a motorcycle up to 125 ccm. (The old legislation allowed to drive motorcycles only up to 50 ccm engine size.) Purchase of motorcycles with 51-125 ccm engines has thus skyrocketed (395%), at the same time causing the previously leading category of vehicles of 0-50 ccm engines drop from 39% in 2012 to the current 15%.

BEST PROSPECTS

The following specific items were the leading exports from the U.S. to Slovakia covered by this Leading Sector, ranked by USD from 2011 to 2012:

ITEM	2011	2012
8708--parts & accessories for motor vehicles (head 8701-8705)	9,367,228	10,061,128
8701--tractors (other than works trucks of heading 8709)	7,961,675	9,653,874
8703--motor cars & vehicles for transporting persons	5,260,949	8,819,720
8711--motorcycles (including mopeds) & cycles with auxiliary motor	1,122,080	1,489,337
8714--parts & accessories for cycles & invalid carriages	105,145	653,547
8704--motor vehicles for transport of goods	140,000	254,840
8705--special purpose motor vehicles	222,000	200,000
8709--works trucks, self-propelled, no lift; stationary tractors; part	128,681	116,170
8716--trailers; other vehicles, not mechanically propelled, part	87,698	69,684
8707--bodies (including cabs), for specific motor vehicles	0	59,744
8712--bicycles & other cycles (including tricycle) no motor	43,820	30,494

Protective clothing including helmets and customization part are the best sellers in the market. High quality and newest (cool) design are highly requested.

MAIN COMPETITORS

The Slovak motorcycle market is highly competitive since all major brands are being imported. Motorcycle accessory suppliers are: 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 13 -16, 2014, Bratislava

http://www.incheba.sk/vystavy/motocykel-6944.html?page_id=6944&lang=en

MOTOCYKEL exhibition will be held simultaneously with Boat Show, Fishing and Cyklo Show exhibitions.

RESOURCES & KEY CONTACTS

Associations

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

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

SPAIN



Capital: Madrid
 Population: 47 million
 GDP: \$1.407 trillion
 (2012)
 Currency: Euro (EUR)
 Language: Spanish

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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 is the second European country in motorcycle production and has 15 different motorcycle production plants. Overall, this sector is comprised of approximately 200 companies dedicated to the production and/or distribution of motorcycles. In 2013 there were 130.750 registered motorcycles and mopeds in Spain.


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. Catalonia accounts for 82% of Spanish production of motorcycles and 80% of jobs related to the motorcycle industry. ANESDOR is the largest interest group representative for the sector, representing 31 companies and approximately 97% of the market. The market is also attractive as an energy efficient mode of transport, imparting lower overall costs both to the environment, as well as to the owner.

MARKET DATA

As results of data collected in August of 2013, the sector experienced drop in sales of 15.2%. This is a significant change but many EU countries experienced the same fall. The top 10 motorcycle brands produced varied by category, both Motorcycles and Mopeds had the following brands in their top list: Honda, Kymco, Yamaha, Piaggio, Reugeot and Keeway. This is of course due to the fact that the other brands may not share the common market and cater to majorly motorcycles or mopeds not both. Honda took the lead with 17.92% of the motorcycle market, while Piaggio took the lead with 26.85% for the moped market. The top brands sold in both markets were:





TOP 15 MOTOCICLETAS



MOTOCICLETAS		Septiembre					Enero-Septiembre 2013				
Marca	Uds. 2013	Ranking	I.P.M.	Uds. 2012	% s/ 2012		Uds. 2013	Ranking	I.P.M.	Uds. 2012	% s/ 2012
<i>Honda</i>	1.523	1 ^a	17,92%	1.450	+4,00%		12.476	1 ^a	17,50%	14.629	-14,70%
<i>Kymco</i>	1.433	2 ^a	16,86%	860	+66,63%		9.300	2 ^a	13,04%	6.638	-3,51%
<i>Yamaha</i>	977	3 ^a	11,44%	947	+15,44%		8.736	3 ^a	11,55%	5.141	-9,88%
<i>Piaggio</i>	762	4 ^a	8,97%	567	+10,92%		6.553	5 ^a	9,20%	7.517	-12,69%
<i>Suzuki</i>	682	5 ^a	8,02%	363	-20,97%		6.852	4 ^a	9,51%	7.547	-9,21%
<i>Sym</i>	467	6 ^a	5,49%	423	+10,40%		4.437	6 ^a	6,22%	3.832	+15,79%
<i>BMW</i>	460	7 ^a	5,41%	363	+26,72%		3.821	7 ^a	5,36%	3.835	-0,37%
<i>KTiM</i>	237	8 ^a	2,79%	152	+55,92%		1.952	9 ^a	2,74%	2.126	-8,18%
<i>Peugeot</i>	199	9 ^a	2,34%	203	-1,97%		1.733	10 ^a	2,50%	2.171	-17,87%
<i>Keeway</i>	106	10 ^a	2,20%	188	+3,72%		1.628	11 ^a	2,28%	1.308	+24,46%
<i>Kawasaki</i>	181	11 ^a	2,20%	135	+38,52%		2.141	8 ^a	3,00%	2.464	-13,11%
<i>Daelin</i>	148	12 ^a	1,72%	273	-46,52%		1.479	12 ^a	2,07%	2.598	-43,07%
<i>Harley Davidson</i>	129	13 ^a	1,52%	121	+6,61%		1.036	14 ^a	1,41%	1.396	-28,01%
<i>Triumph</i>	120	14 ^a	1,41%	80	+50,00%		1.044	13 ^a	1,46%	1.285	-18,75%
<i>Aprilia</i>	105	15 ^a	1,24%	123	-14,63%		971	15 ^a	1,36%	1.640	-40,19%
<i>Otras Marcas</i>	682		10,38%				7.626		10,69%	6.292	
Totales	8.499	1	100,00%	7.500	+13,32%		71.318	1	100,00%	80.419	-11,32%

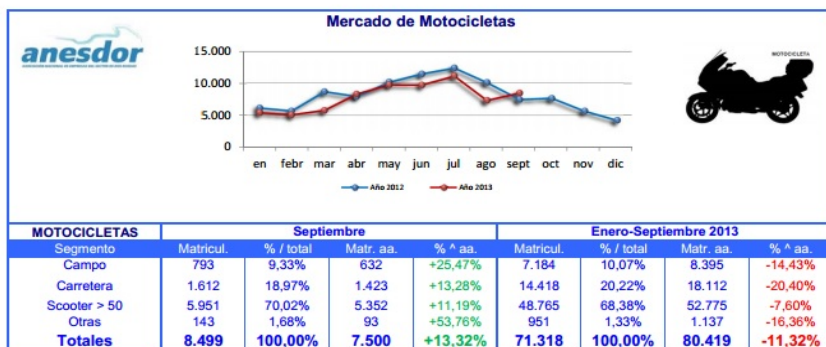
Rankings Top15 por marca

<div><div></div><div>TOP 15 CICLOMOTORES</div><div>ECONOMIA</div></div>											
CICLOMOTORES		Septiembre					Enero-Septiembre 2013				
Marca	Uds. 2013	Ranking	I.P.M.	Uds. 2012	% s/ 2012		Uds. 2013	Ranking	I.P.M.	Uds. 2012	% s/ 2012
Piaggio	371	1ª	26,85%	337	+10,09%		3.747	1ª	32,37%	4.382	-14,49%
Yamaha	239	2ª	17,29%	254	-5,91%		1.728	2ª	14,93%	2.132	-18,95%
Peugeot	150	3ª	10,85%	189	-20,63%		1.276	3ª	11,02%	1.738	-26,58%
Kymco	141	4ª	10,20%	92	+53,26%		953	4ª	8,23%	970	-1,75%
Derbi	77	5ª	5,57%	110	-30,00%		681	5ª	5,88%	1.097	-37,92%
Sym	64	6ª	4,63%	61	+4,92%		467	6ª	4,03%	564	-17,20%
Keeway	56	7ª	4,05%	51	+9,80%		405	7ª	3,50%	479	-15,45%
Rieju	47	8ª	3,40%	39	+20,51%		338	8ª	2,92%	338	0,00%
Honda	35	9ª	2,53%	43	-18,60%		239	10ª	2,06%	484	-50,62%
Aprilia	33	10ª	2,39%	43	-23,26%		297	9ª	2,57%	489	-39,26%
Ride	25	11ª	1,81%	21	+19,05%		120	12ª	1,04%	57	+110,53%
Beta	15	12ª	1,09%	27	-44,44%		144	11ª	1,24%	236	-38,98%
Generic	12	13ª	0,87%	3	+300,00%		96	13ª	0,83%	69	+39,13%
Malco Motor	12	14ª	0,87%	6	+100,00%		60	18ª	0,52%	26	+130,77%
Gilera	10	15ª	0,72%	7	+42,86%		76	15ª	0,66%	77	-1,30%
Otras Marcas	95		6,87%	185			950		8,21%	1.676	
Totales	1.382	1	100,00%	1.468	-5,86%		11.577	1	100,00%	14.814	-21,85%

Source: www.ansedor.com

Although the motorcycle market has experienced a fall in sales during the past year, due to a new law approved in October of 2013, PIMA Air Plan 2, there will be significant changes in the market. This plan will provide prospective buyers will be given a total of 500 euro(USD683) for electric motorcycles (350 euro from the government and 150 euro by the dealership). In the case of electronic mopeds buyers will be given a total of 300 euro(USD410) (230 euro by the government and 70 euro by the dealership). These grants may be increased if the operation is written off a bike short (category L) of more than five years, or a vehicle above (category M or N1) of more than 7 years. The plan PIMA Aire Plan 2 has both social and economic benefits for Spain.

RESUMEN DE MERCADO SEPTIEMBRE 2013



Source: www.anesdor.com

Above is the summary for the 2013 market. The graphs show the latest collected data from September 2013. The *Left Column*: September 2013, *Right Column*: January to September 2013. *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)

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: \$538 billion
 Currency: Swedish Krona (SEK)
 Language: Swedish

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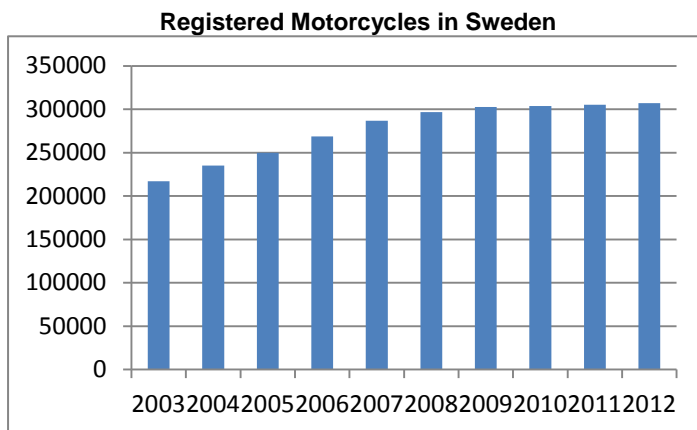
SUMMARY

The Swedish motorcycle market was growing steadily from early 2000 to 2008 but has since experienced a slight slow-down. While motorcycles manufactured in Asia and Europe dominate, American motorcycles are also quite popular in Sweden and currently account for 20% of the total market. There is also a notable private import from the U.S., especially when it comes to motocross, enduro and other race motorcycles.

Best prospects for U.S. imports include premium brands and accessories, and safety equipment.

THE SWEDISH MOTORCYCLE MARKET

The Swedish MC market is valued at \$1.5 billion a year. Three million people or 30% of the Swedish population, have driver's licenses for motorcycles. The average number of licenses issued every year is 11,000. Since 2003, the number of motorcycles has increased from around 220,000 to over 300,000. The growth peaked in 2007 and has since slowed down due to general economic downturn. According to industry estimates, the sales have been picking up in 2013 and the growth is expected to continue in 2014.



Source: SCB

The chart indicates the number of registered motorcycles in Sweden between 2003 and 2012. It includes both two-wheeled motorcycles and quads. The sale of quad motorcycles increased notably in 2006, as it became legal to drive them on public roads. Some 5000 new quads were registered in 2006 and 7000 in 2007. The trend then subdued and new registrations went down to approximately 3000 per year. When it comes to two-wheeled motorcycles, the average number of new registrations per year was 10,000 until 2009 and has since gone down to an average of 8000 registrations per year.

When it comes to different MC categories, the most popular ones are Off road, Allround, Scooter, Naked, Custom and Touring bikes.

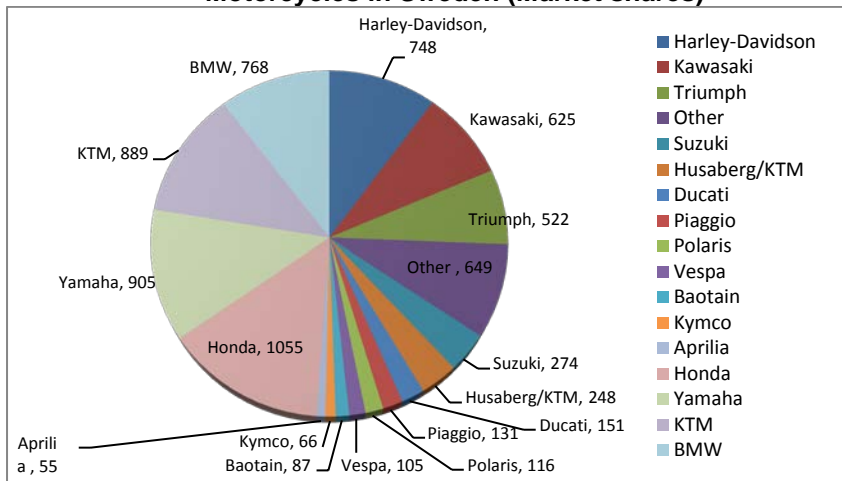
IMPORTS

There are no domestic manufacturers of motorcycles in Sweden, as the formerly Swedish off-road Husaberg motorcycles are today made by KTM in Austria. In 2012, Sweden imported \$110 million worth of motorcycles and parts from different parts of the world. The largest import shares were held by Germany, Japan and United States.

Japanese brands, such as Yamaha, Honda, Kawasaki and Suzuki, are market leaders and together account for almost 60% of the market. Harley-Davidson is the largest U.S. brand, with 13% of the market. In the last 10 years more H-D motorcycles have been sold per capita in Sweden than in any other country in the world. Other MCs from the U.S. include Boss Hoss, Victory/Polaris, Saxon, and the electric motorcycle Zero, together accounting for 7% of the market. There is also a significant private import of race motorcycles from the United States, mainly motocross and endure bikes.

When it comes to quad bikes, the most popular brands include BRP, TGB, Polaris and Arctic Cat.

Motorcycles in Sweden (Market shares)



BEST PROSPECTS

There is a great demand for premium brand motor cycles such as Harley-Davidson and BMW in Sweden, and also race motorcycles for Motocross, enduro and Trial. Swedes see their bikes as recreational vehicles and demand premium quality rather than low cost.

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 attire, including motorcycle gloves, boots, jacket and pants. Riding a motorcycle without a helmet is illegal in Sweden. This creates a solid demand for accessories, safety equipment and motorcycle apparel.

TRADE EVENTS

MC-mässan, Jan23-26, 2014, Gothenburg, <http://www.mcmassan.se/f-ouml-rsta%20summary%20artikeln>

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.mcxf.se

TURKEY



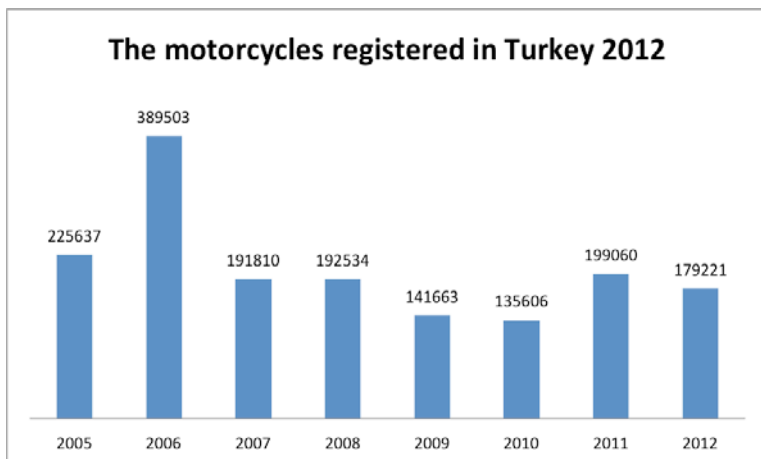
Capital: Ankara
 Population: 75.6 million
 GDP: \$794.4 billion
 Currency: Turkish Lira (TL)
 Language: Turkish

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SUMMARY

Motorcycling is a relatively new phenomenon in Turkey. The total motorcycles, parts and accessories market was around \$321.1 in 2012. 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 local manufacturers that produce under the license of foreign brands; however, imports are dominated by Chinese products. U.S. motorcycle imports account for 1.8% of the market and mainly consist of motorcycles with engines exceeding 800 cc.

U.S. suppliers, which currently have a very low market share both in the motorcycles sales and accessories markets, are strongly encouraged to work with a local distributor to both overcome the lengthy procedures for importation of motorcycles, and also get their products known in the local market.



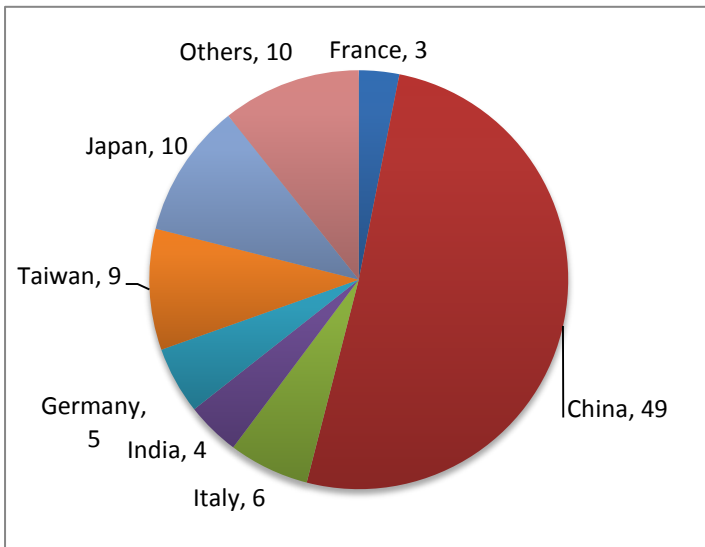
As seen from above table, sales of motorcycles boomed in 2006. The Government of Turkey (GOT) wanted to take advantage of this booming market and that year increased the Special Consumption Tax (OTV) on motorcycle sales from 8% to 22% for engine sizes of less than 250 cc and 37% for engines over 250cc i. However, this tax increase resulted in a dramatic decrease the following year (only 192K units). In 2008, due to the economic crisis,

GOT took measures to assist their indigenous industry. They decreased the OTV from 22% to 11% engine sizes below 250 cc and decreased the OTV from 37% to 32% for those above 250 cc. However, while the tax decrease helped the industry to reduce inventory a little, but it wasn't sufficient to increase sales to expected levels as can be clearly seen in the above graph.

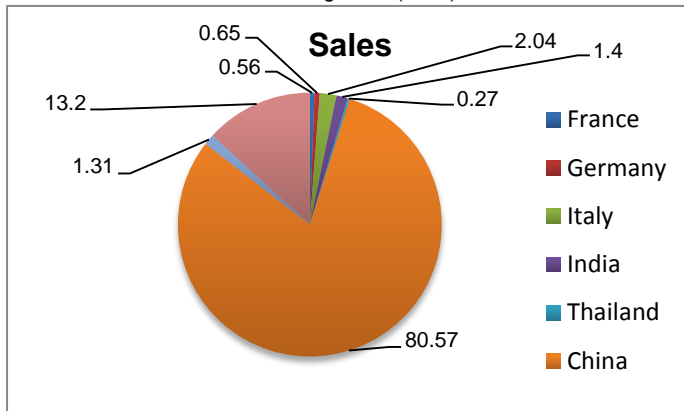
Very recently, on February 25, 2013, GOT has decreased OTV to 8%, announcing this move at the Eurasia Moto Bike Expo in Istanbul, where it was very well received. Experts expect a positive impact in the sales volumes. Two major associations of the market, MOTED and MOTODER, had been working hard to decrease the OTV for the last five years. Italy has the highest per capita motorcycle ownership in Europe (181 per 1000 citizens), whereas Turkey is only at 39 per 1000. Currently, the number of motorcycles in Turkey is 1.93million.

In 2004, there were 10 internationally known motorcycle brands present in Turkey. The additional imports from China have increased that number to 22. However, these brands are not taking market share away from other internationally known brands, but rather have increased the size of the overall market by supplying cheaper products.

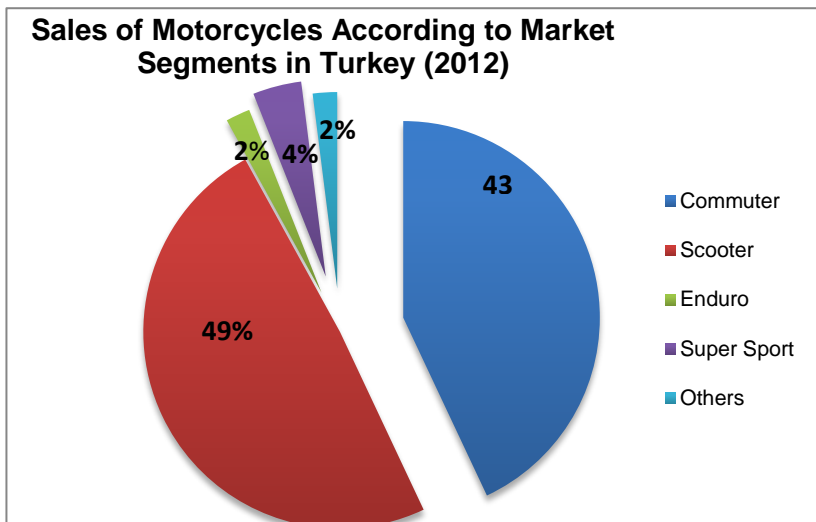
Major suppliers of two-wheeled vehicle according to TUIK figures are broken down in the chart below (2012)



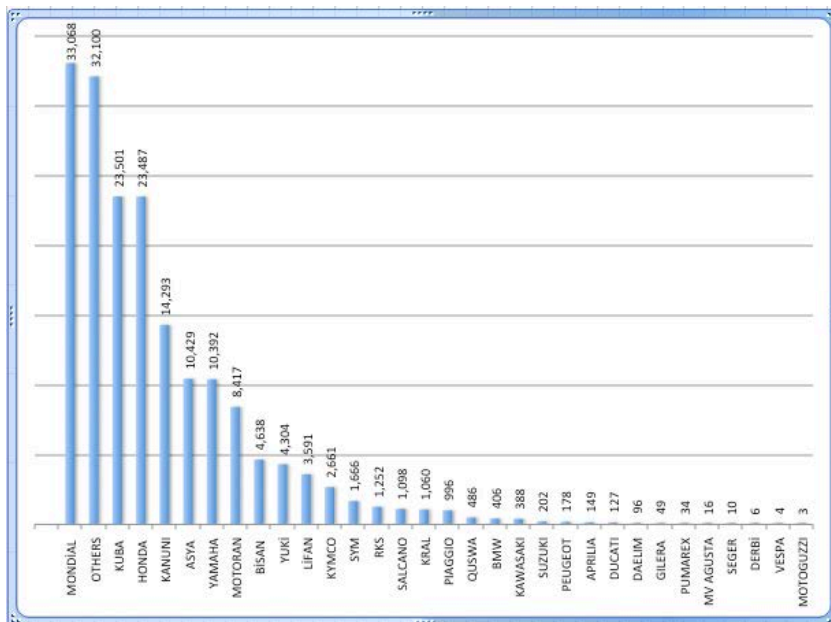
The motorcycle accessory market is broken down by country of origin in the chart below according TUIK (2012):



As can be seen from the charts above, China is the primary supplier both for motorcycles (49%), and for motorcycle accessories (80.57%).



As seen from the chart above, cheaper models, like scooters, have the largest market share. There was an increase of 21% in scooter sales in 2012 compared to 2011. Clearly, scooters were the most preferred with 49% (21,293), followed by commuters, with 43% (25,226) shares. Different brands sold in the Turkish market and their sales volumes are shown below:



Source: MOTED

According to these results, we see that Mondial retains its leadership in sales, with 33,068. Honda takes the 3rd place. As can be seen in above chart, a large number of brands are sold in the Turkish market, however, apart from some brands like Asya Motor, Kanuni, Kuba, Motoran, rest aren't very popular. The total number of motorcycles sold in 2012 was 179,221.

BEST PROSPECTS

- High end motorcycles – above 800 cm³
- Low end motorcycles or scooters for commercial use (deliveries). More than 42% of the motorcycles imported are with engine sizes below 250 cm³. Motorcycles between 500 and 800 cc were %7.9 and motorcycles with engines larger than 800 cc were 16.6% of the total imports.

TRADE EVENTS

Eurasia Moto Bike Expo 2014, February 27 - March 2, 2014, Istanbul, www.motoplus.org

RESOURCES & KEY CONTACTS

Associations

MOTED- Motorsiklet Endustrisi Dernegi (Motorcycle Industry Association), www.moted.net
 Türkiye Motorsiklet Federasyonu (Turkish Motorcycles Federation), www.tmf.org.tr

UNITED KINGDOM



Capital: London
 Population: 63.4million
 GDP 2012: \$2.3trillion
 Currency: Pound Sterling (GBP)
 Language: English

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SUMMARY

In the UK there are approximately 1.38 million registered motorcycles. UK motorcycle-related manufacturing (including motorcycle related products such as fuels/lubricants, clothing and components), had an estimated turnover of \$649 million in 2012. This is forecast to increase by about 12%, to reach \$723 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. Stricter global emission standards will require motorcycle redesigns and are expected to trigger demand for newer, more economical engines.

MARKET DEMAND

There are a total of 90 to 100 thousand new motorcycle and moped registrations per year. Imports dominate the UK motorcycles, mopeds and scooters market. Triumph is the only major domestic manufacturer, accounting for nearly 83% 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 has held the top spot for the UK's best-selling scooter. The total value of imports in 2012 was estimated at almost \$1.1 billion.

ANNUAL MOTORCYCLE AND MOPED REGISTRATION

MOTORCYCLES	2009	% Chg.	2010	% Chg.	2011	% Chg.	2012
0 - 100cm ³	807	-35.7	519	-24.5	392	-31.9	267
101 - 125cm ³	29403	-5.9	27670	17.2	32439	8.7	35269
126 - 500cm ³	7268	-18.6	5914	-3.1	5732	6.6	6109
501 - 700cm ³	19085	-28.1	13721	-25.9	10168	6.6	10839
701 - 900cm ³	8416	-14.8	7172	19.9	8598	-7.9	7921
Over 900cm ³	29941	-11.8	26406	-16.4	22076	-10.1	19846
Total Motorcycles	94920	-14.2	81402	-2.5	79405	1.1	80251
Total Mopeds	16591	-12.5	14520	-0.5	14444	-7.1	13416
Total PTW	111511	-14.0	95922	-2.2	93849	-0.2	93667

ANNUAL NEW MOTORCYCLE REGISTRATIONS BY STYLE

	2009	% Chg.	2010	% Chg.	2011	% Chg.	2012
Scooters	16847	-6.2	15798	20.1	18968	10.8	21022
Trail/Enduro	5395	-13.2	4684	-13.4	4057	3.4	4193
Naked	21300	-16.2	17839	-3.6	17204	-0.1	17194
Sport/Touring	8338	-9.8	7518	-32.4	5084	-13.0	4425
Supersport	18961	-24.8	14257	-9.9	12851	-4.2	12315
Touring	3667	-11.4	3249	-14.5	2778	-22.9	2142
Custom	9297	-10.6	8307	-5.2	7871	-13.0	6848
Adventure	10538	-11.7	9309	9.7	10208	15.2	11759
Unspecified	577	-23.6	441	-12.9	384	-8.1	353
Total Motorcycles	94920	-14.2	81402	-2.5	79405	1.1	80251

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) - <http://www.environment-agency.gov.uk/business/regulation/31887.aspx>

Mandatory European Community Whole Vehicle Type Approval (ECWVTA) has been in place for motorcycles for a number of years. Directive 92/61/EEC was replaced and repealed by Directive 2002/24/EC. A new Framework Directive becomes effective from January 2016. The Framework Directive covers 2, 3 and some light 4 wheeled vehicles (quadricycles). EC Whole Vehicle Type Approval (ECWVTA) is based around EC Directives and provides for the approval of whole vehicles, in addition to vehicle systems and separate components. This certification is accepted throughout the EU without the need for further testing until a standard is updated or your design changes. Automotive EC Directives and UN Regulations require third party approval - testing, certification and production conformity assessment by an independent body. Each Member State is required to appoint an Approval Authority to issue the approvals and a Technical Service to carry out the testing to the Directives and Regulations. An approval issued by one Authority will be accepted in all the Member States. For those companies manufacturing vehicles in low numbers there is The Motorcycle Single Vehicle Approval (MSVA) scheme. The MSVA scheme is a less onerous approval route in terms of compliance, but involves an individual inspection of each vehicle. This route to approval gives sales rights only within the UK, not

automatically throughout the rest of Europe. The following link explains motorcycle approval in more detail: <http://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 Euro 3, [Directive 2002/51/EC](#). Future standards are Euro 4 emission standards for motorbikes from 2016 and mopeds from 2017; Euro 5 standards for all two- or three-wheel vehicles from 2020 [Regulation \(EU\) No 168/2013](#).

TRADE EVENTS

Motorcycle Live – <http://www.motorcycletlive.co.uk/>

RESOURCES & KEY CONTACTS

Associations

The Motorcycle Industry Association - <http://www.mcia.co.uk/>

Society of Motor Manufacturers and Traders - <https://www.smmmt.co.uk/>

Retail Motor Industry Federation - <http://www.rmif.co.uk/>

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The U.S. Commercial Service's Automotive & Ground Transportation team is comprised of specialists, located throughout the United 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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