

Motorcycle Market Report

Motorcycle Market - By Type (Standard, Standard, Cruiser, Adventure), By Propulsion Type (Internal Combustion Engine (ICE), Electric), By Engine Capacity (Under 500cc, 500cc - 1000cc, Over 1000cc), Forecast 2024 - 2032

About GMI

Global Market Insights (GMI) is a global market research and management consulting company catering to corporations, non-profits, universities, and government agencies. Our goal is to partner with organizations to make sustained strategic improvements and meet growth goals.

Our industry research reports are designed to provide quantifiable information combined with key industry insights. We aim to provide the necessary data to our clients to ensure sustainable organizational development. Whether exploring new markets, developing new grades, or taking advantage of niche growth opportunities, we have reports to accelerate and enhance our clients' strategies.

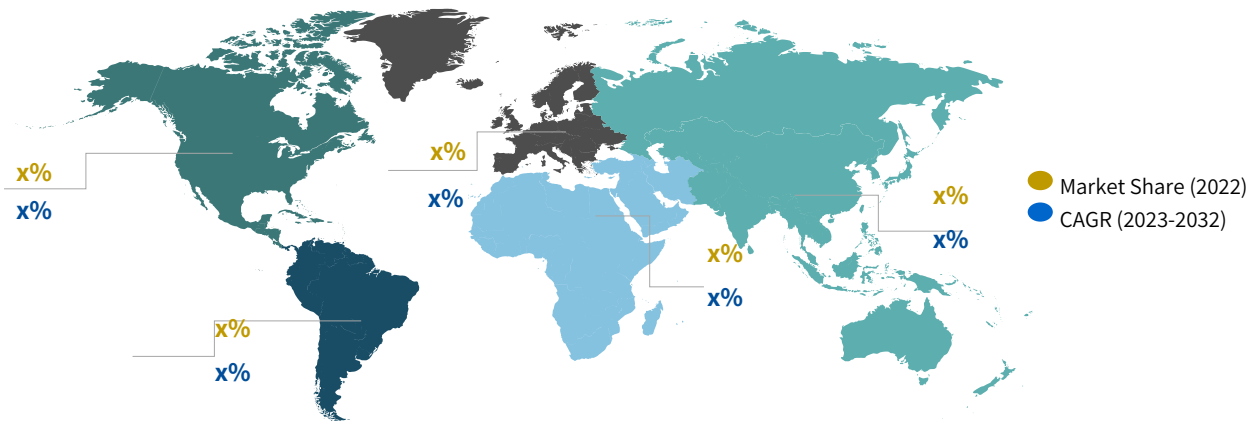
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About the Report

Motorcycle Market

A USD 225.8 billion Market Opportunity by 2032, Growing at a CAGR of 8.5%



The market report offers a detailed analysis about the market growth, market insights, current trends, opportunities, and challenges in the rapidly evolving landscape. This report serves as a valuable resource for businesses, organization, associations, government, industry professionals, and decision-makers seeking to gain a deeper understanding of the market dynamics and leverage key insights to drive strategic growth.

The report answers the following questions:

- **Market Size and Growth:** The study provides an accurate assessment of the current market size and future growth potential. These granular insights can be resourceful to identify new potential markets, revise investment strategies, align resources among others.
- **Competitive Landscape:** The study provides a thorough analysis of the competitive landscape. Our study includes detailed profiles of major companies, their market share, SWOT analysis, product offerings, and strategic initiatives. This exhaustive landscape will help you to glean insights to inform your business strategies.
- **Industry Trends, Opportunities and Risk Assessment:** The report discusses the latest trends shaping the industry. Our research explores various business trends, emerging technologies and trends, market driving forces, and their impact on the market. The report also assesses the attractiveness of the industry using Porter's Five forces, and pinpoint areas where you can adjust your strategy to improve profitability.
- **Impact Analysis:** Various scenarios were studied, and the most likely model is devised to measure the impact of COVID-19 pandemic and Russia-Ukraine war.
- **Geographical Analysis:** The report provides insights into various dynamics and growth opportunities of various segments and sub-segments at the global, regional, and country level.

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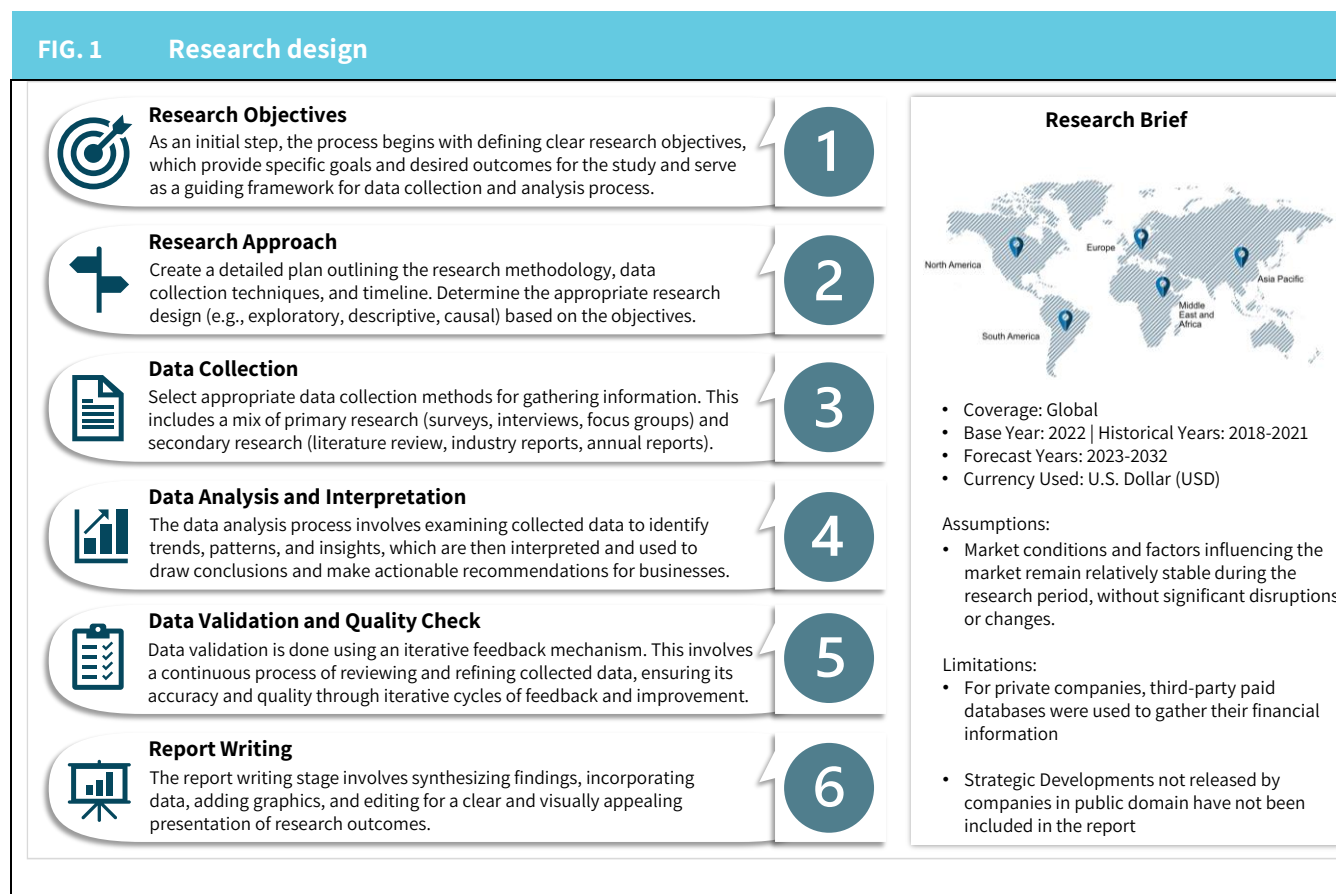
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Chapter 1 Research Methodology

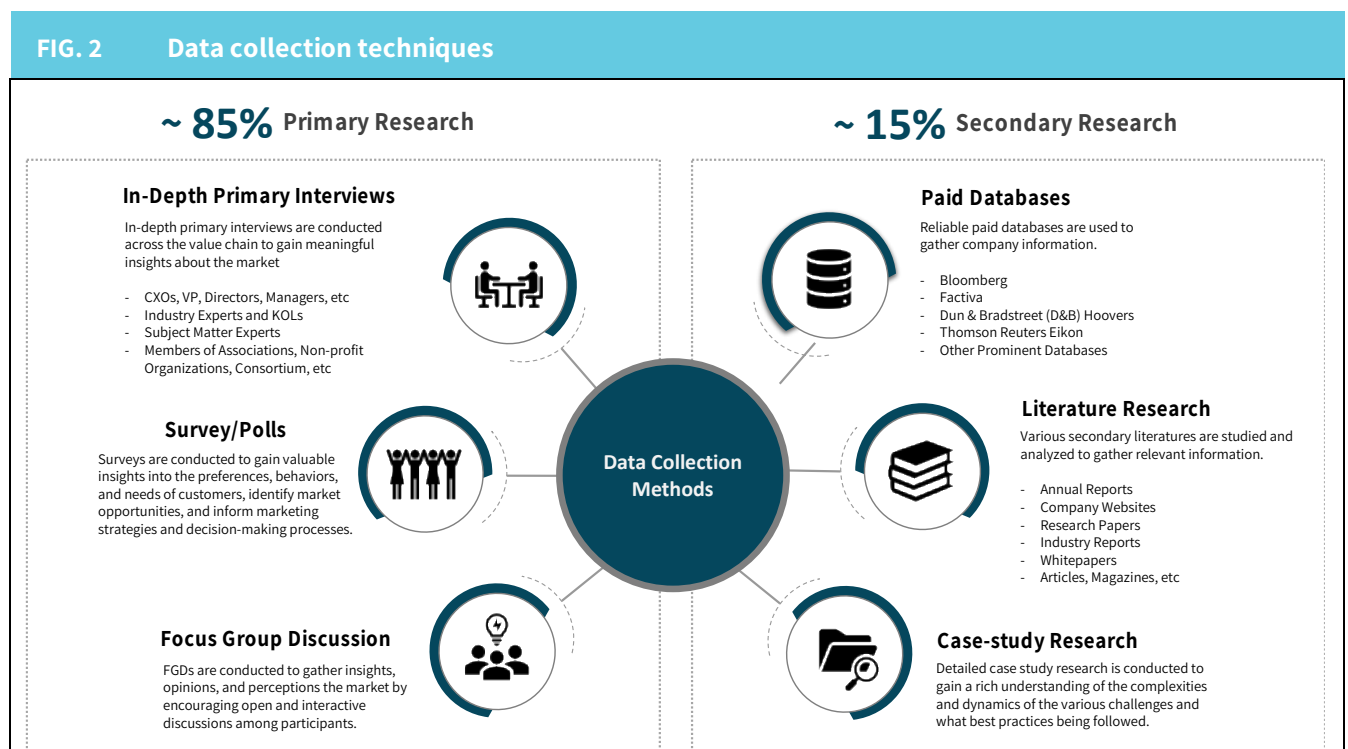
1.1 Research design

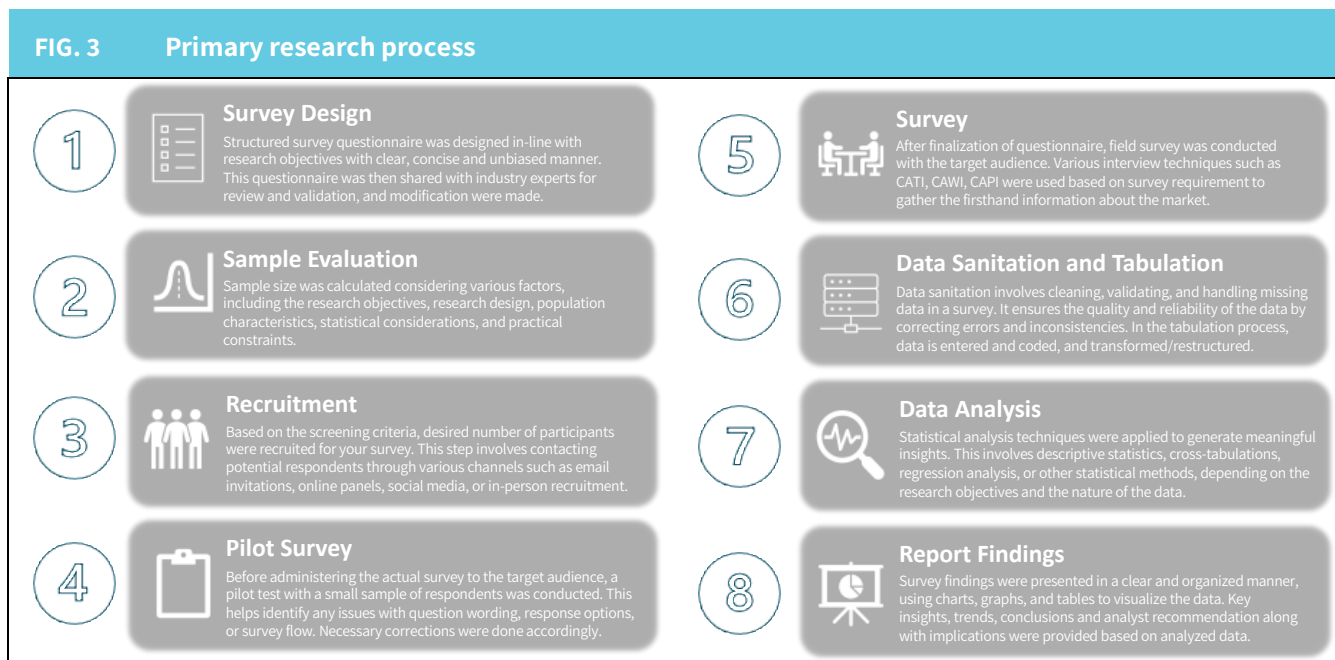
Global Market Insights has followed a rigorous and comprehensive research methodology to calculate the statistical data points present in this report. An exclusive research design was devised for this study which includes data collection techniques, top-down and bottom-up approach, forecast model, and validation process.



1.2 Data collection techniques

For our market research study, we employed a combination of primary and secondary data collection techniques. Primary data collection involved surveys, interviews, and observations to gather new and original data directly. Secondary data collection involved sourcing credible information from industry reports, government publications, non-profit organizations, association, academic research papers, paid databases, magazines among others. These sources supplemented our primary research findings, providing valuable background information, market trends, and statistical data. By utilizing both primary and secondary techniques, the report ensures a comprehensive analysis, delivering reliable insights for informed decision-making.

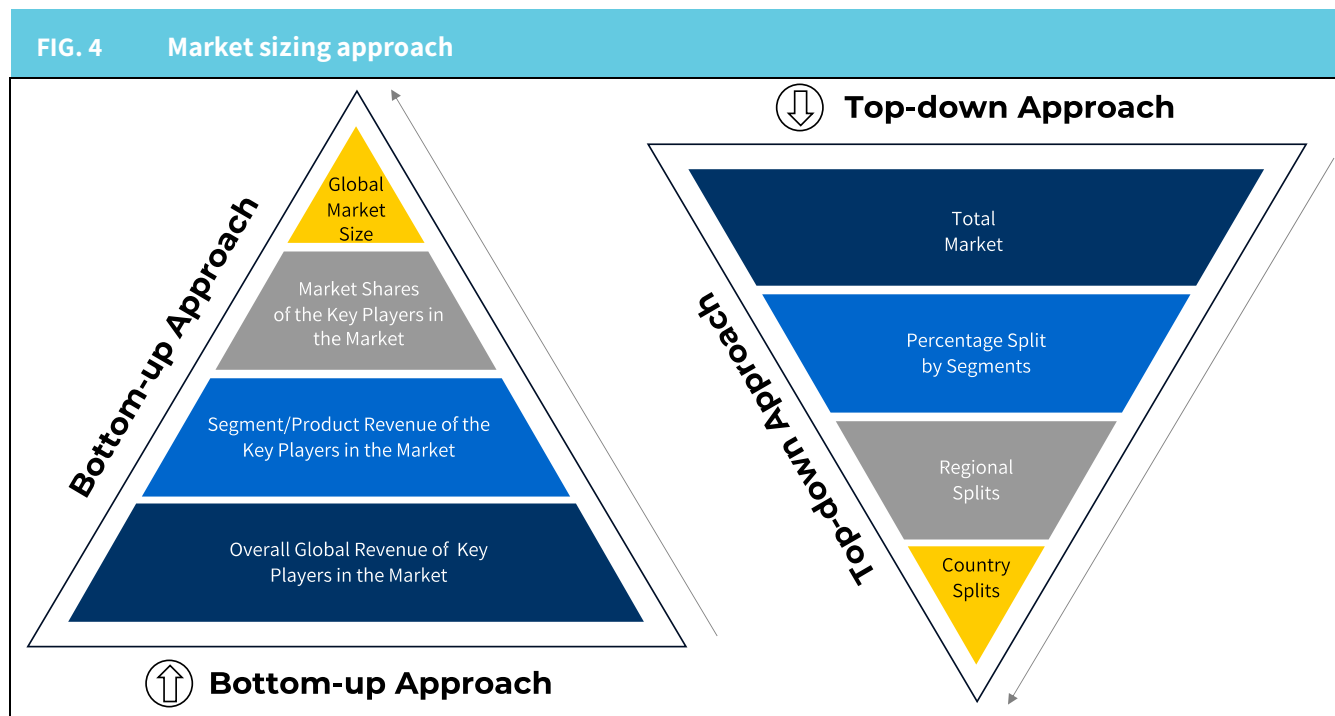




1.3 Market size estimation

In order to determine the market size for our research study, we employed both top-down and bottom-up approach that allowed for a comprehensive and accurate estimation. Firstly, we employed the bottom-up approach, where we collected data from individual companies and market participants to estimate their market share and then aggregated the data to arrive at the total market size. This approach involved conducting surveys, interviews, and analyzing financial reports to gather detailed information on company revenues and market share.

Additionally, we utilized the top-down approach, which involves analyzing industry-level data and market indicators to derive the overall market size. This approach included examining relevant reports, industry databases, and government publications to gather data on the total revenue generated by the market players and key industry segments. By combining these techniques, we ensured a robust and reliable calculation of the market size, providing our client with a comprehensive understanding of the market's magnitude and potential.



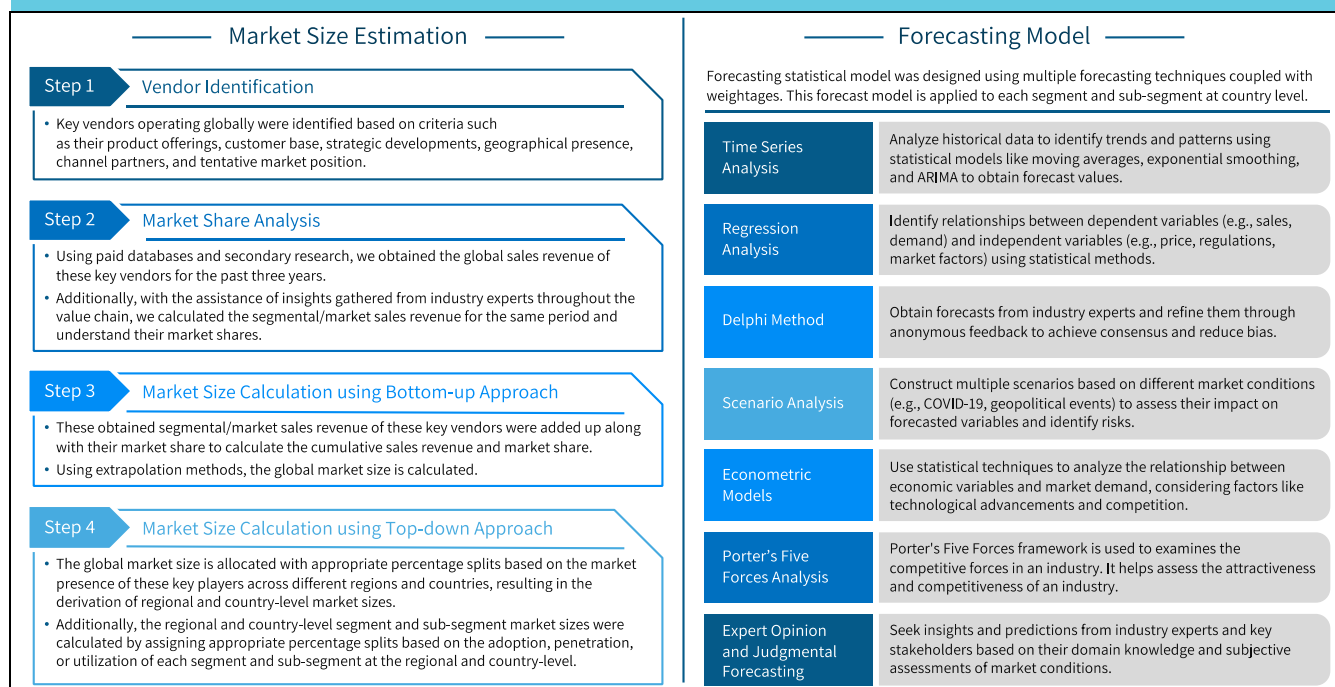
1.4 Forecasting model

Forecasting statistical model was designed using multiple forecasting techniques coupled with weightages. This forecast model is applied to each segment and sub-segment at country level. For each country level markets, key industry impact forces were analyzed and assigned weights in order of their importance. These weights were distributed across the forecast period and a country growth rate was derived. Some of the major parameters include:

- Historical market performance
- Macro and Micro-economic performance
- Market dynamics
- Regulatory framework
- Adoption trends
- Technological advancements
- Infrastructure development
- Raw material trends

The impact of various competitive strategic developments such as merger & acquisition, partnership, collaborations, new product launches, new innovation, etc. were also considered while forecasting the market size.

FIG. 5 Forecasting model



Chapter 2 Executive Summary

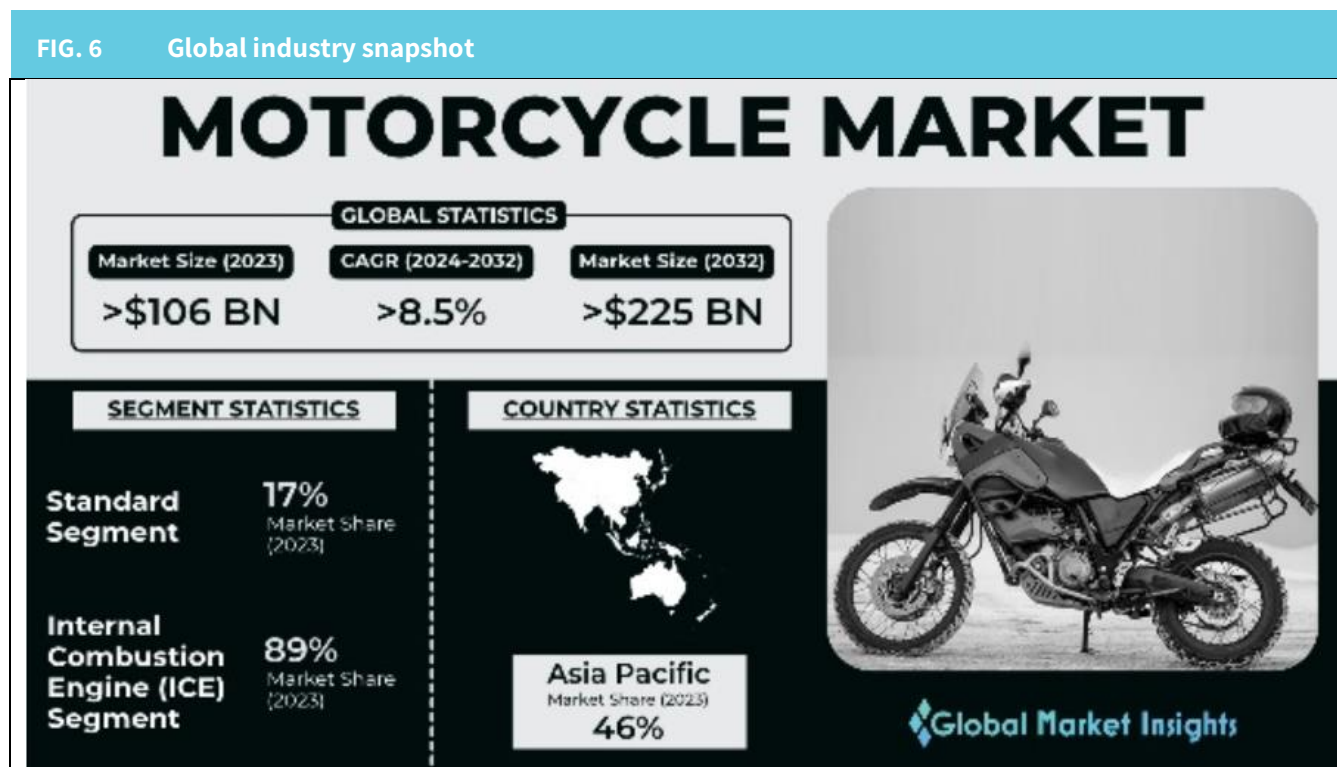


TABLE 1. Motorcycle market, 2018 - 2023 (USD Million)

	2018	2019	2020	2021	2022	2023
USD Million	88,844.8	93,280.5	86,405.6	91,695.9	98,869.8	xx

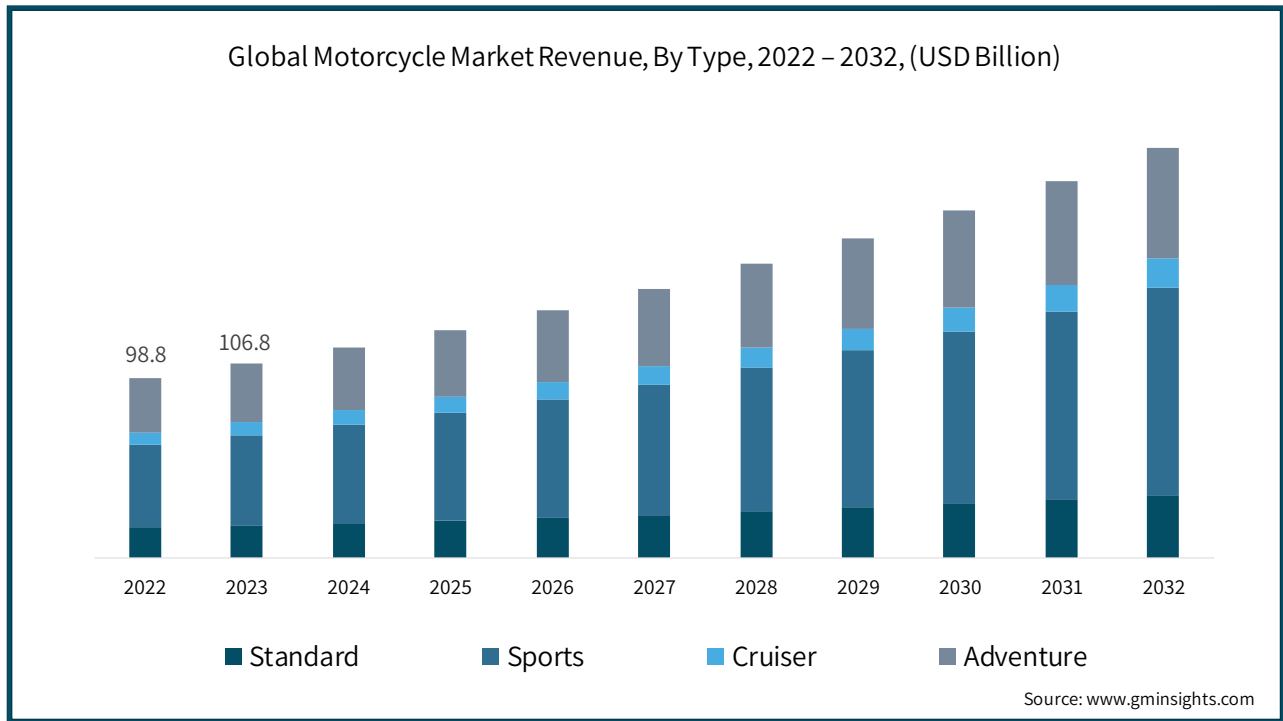
Source: Industry Associations & Journals, Company Annual Reports, Owler pro, Primary Interviews, Global Market Insights

TABLE 2. Motorcycle market, 2024 - 2032 (USD Million)

	2024	2025	2026	2027	2028	2029	2030	2031	2032	CAGR (2023-32)
USD Million	xx	xx	xx	xx	xx	xx	xx	xx	xx	xx%

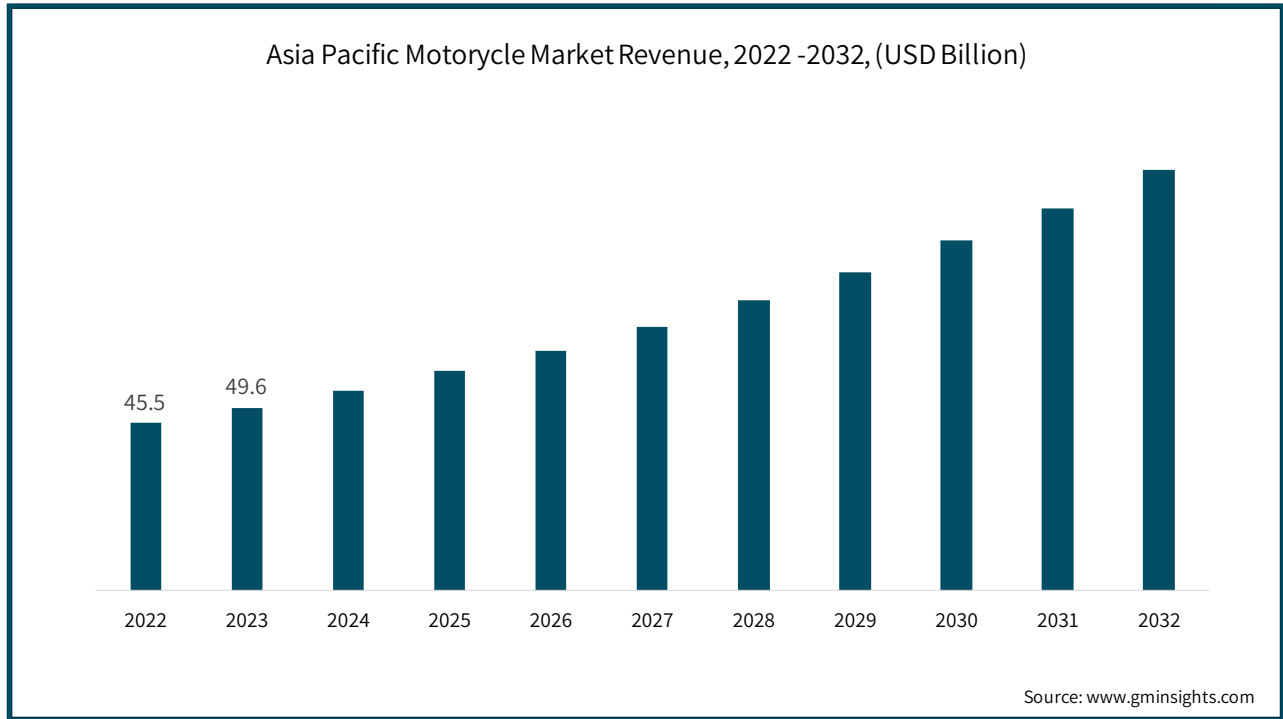
Source: Industry Associations & Journals, Company Annual Reports, Owler pro, Primary Interviews, Global Market Insights

2.1 Type trends



Based on the type, the market is divided into standard, sports, cruiser and adventure. The standard segment accounted for around 17% of the market share in 2023 and is anticipated to grow significantly in the coming years. Renowned for their versatility and harmonious blend of performance and comfort, standard motorcycles attract a diverse clientele. Their practical design, reasonable pricing, and adaptability to different riding styles contribute to their broad acceptance. As riders increasingly seek versatile and accessible options, the standard motorcycle will continue to be the preferred two-wheeled transportation.

2.2 Regional trends



Asia Pacific is experiencing growth in the motorcycle market. The region accounted for a market share of around 46% in 2023 and is poised for substantial growth over the forecast period. With a rising population and increasing disposable income, motorcycle ownership has surged. Supportive governmental policies and a thriving manufacturing sector further contribute to this growth. As motorcycles play an integral role in transportation, the APAC region emerged as a key contributor to shaping the industry's trajectory through continual expansion and innovation. For instance, in 2023, Harley-Davidson unveiled its highly awaited X440 motorcycle, manufactured in India. This affordable bike is tailored for the Indian market and is the result of a collaborative effort between Harley-Davidson and Hero MotorCorp. This milestone signifies a noteworthy advancement in the motorcycle market.

Chapter 3 Industry Insights

FIG. 7 Industry ecosystem analysis

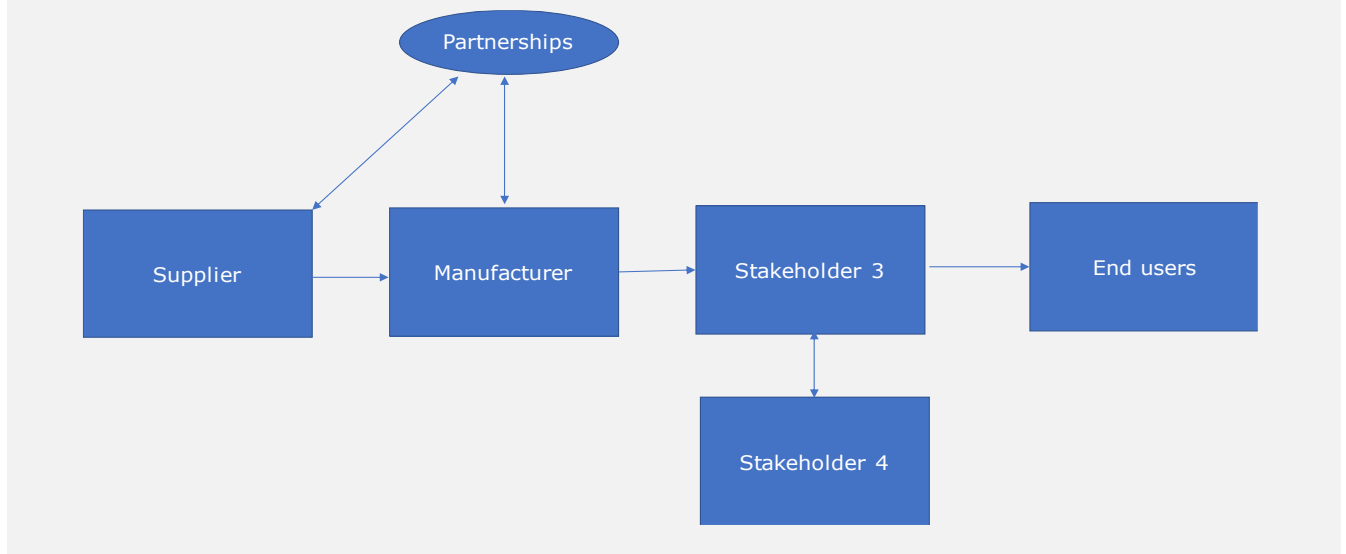
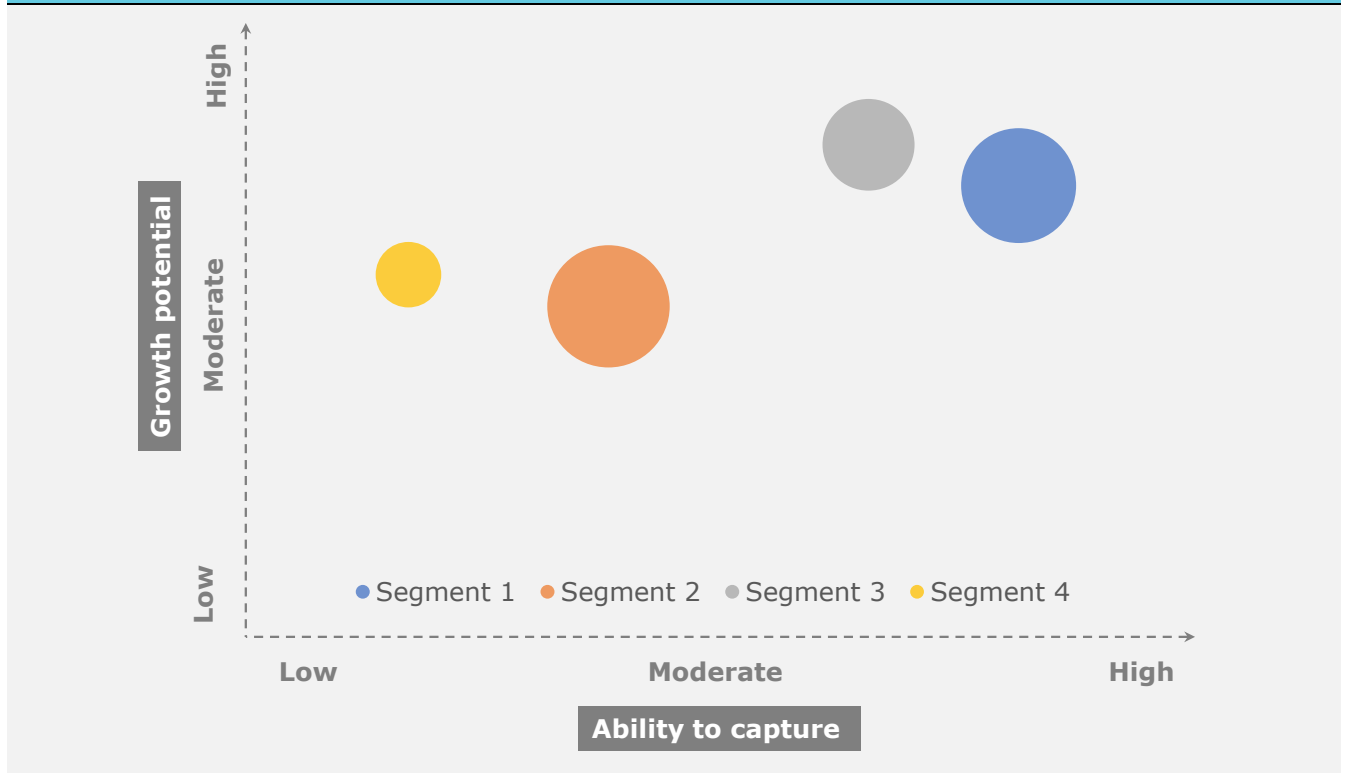



FIG. 8 Growth potential analysis



3.1 Industry impact forces



Growth driver	Short term	Medium term	Long term
Increasing urbanization and traffic congestion	x	x	x
More fuel-efficient compared to larger vehicles	x	x	x
Shifting consumer preferences	x	x	x
Increasing disposable income in developing economies	x	x	x
Industry pitfall	Short term	Medium term	Long term
Limited storage and passenger capacity	x	x	x
Safety concerns	x	x	x

3.1.1 Growth drivers

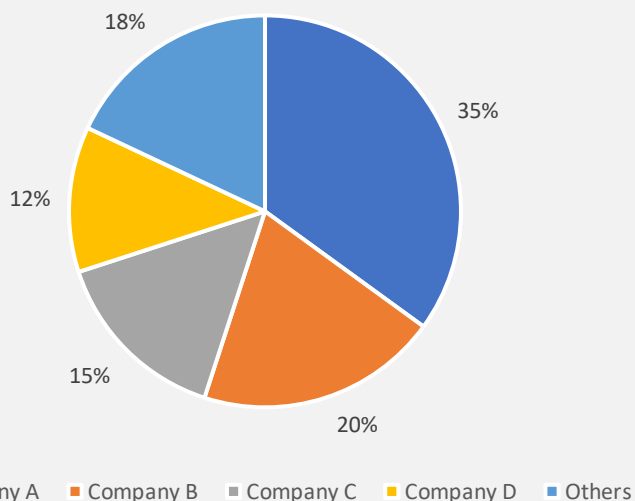
3.1.1.1 Driver 1

Technological strides in engine development and enhanced purchasing power are pivotal in propelling the growth of the motorcycle market. Innovations in engine efficiency, emission controls, and connectivity features cater to evolving consumer preferences. Higher purchasing power, particularly among the expanding middle class, fuels demand for a diverse range of motorcycles, driving manufacturers to introduce advanced models. This convergence of technology and consumer affordability contributes to the continued expansion of the market. Companies are actively manufacturing bikes with the latest advancements in engine and brake systems. For instance, in 2023, Harley-Davidson unveiled its eagerly awaited made-in-India X440 motorcycle, a budget-friendly model designed for the Indian market in collaboration with Hero MotorCorp. The X440 boasts a powerful air/oil-cooled 440cc single-cylinder engine with an 8,000 rpm redline, along with single-disc brakes on both wheels and standard dual-channel ABS for enhanced safety.

Chapter 4 Competitive Landscape, 2023

4.1 Company market share analysis

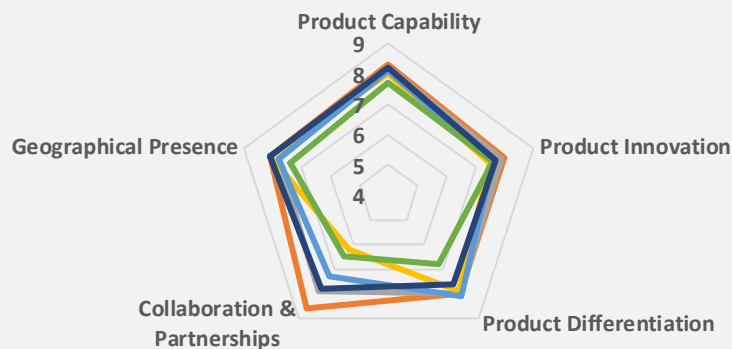
FIG. 9 Company market share, 2023



Note: The above chart is representational

4.2 Competitive analysis, 2023

FIG. 10 Competitive analysis of major market players, 2023



Source: Global Market Insights, Paid Databases, Primary Research

4.2.1 Chart key

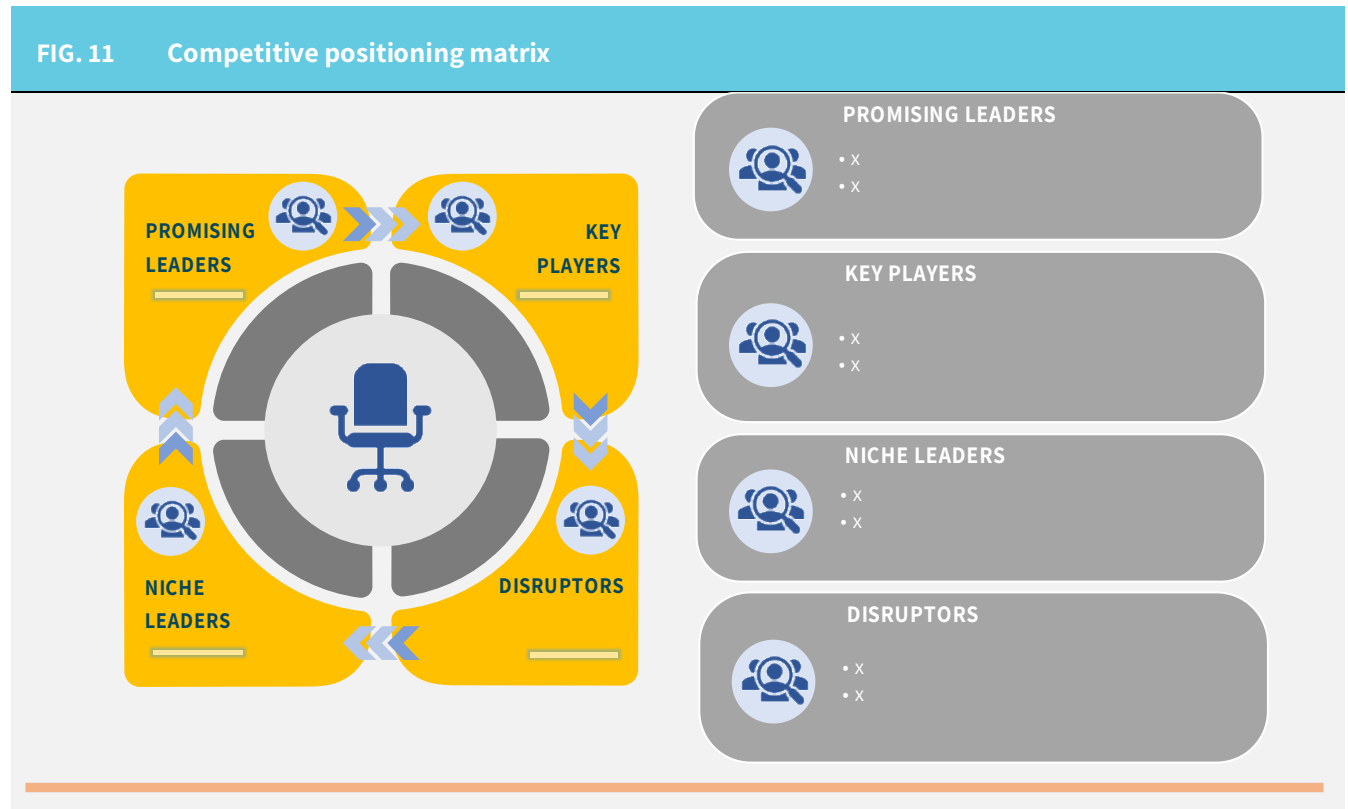
- Product innovation:** Indicates the ability of a vendor to consistently launch innovative products/services that are regularly updated and offer customers with novel & cutting-edge technologies. A higher score indicates better performance.
- Product differentiation:** The design and delivery of a service to have unique & valuable characteristics as compared to other services in the market.
- Partnerships/Collaborations:** Provide a gauge for vendor strategic alliances based on partnerships with the leading industry giants, distributor networks, and technology partners. A higher score indicates better performance.
- Product capability:** Measures the performance and inherent features of a vendor's offerings based on the ease of use, functionalities, and enterprise value addition. A higher score indicates better performance.
- Geographic presence:** Geographic presence measures the availability of the company's products & services across various regions.

TABLE 1 Competitive analysis of major market players

Factor	Company A	Company B	Company C	Company D	Company E
Product Capability	x	x	x	x	x
Product Innovation	x	x	x	x	x
Product Differentiation	x	x	x	x	x
Collaborations & Partnerships	x	x	x	x	x
Geographical Presence	x	x	x	x	x

Source: Global Market Insights, Paid Databases, Primary Research

4.3 Competitive positioning matrix



Source: Global Market Insights, Paid Databases, Primary Research

The competitive positioning quadrant includes vendors offering diverse products, solutions, or services existing in the market. The companies or vendors are segregated based on services and industry verticals, or their Unique Selling Points (USPs). Thus, the quadrant model has four categories: promising leaders, key players, niche leaders, and disruptors.

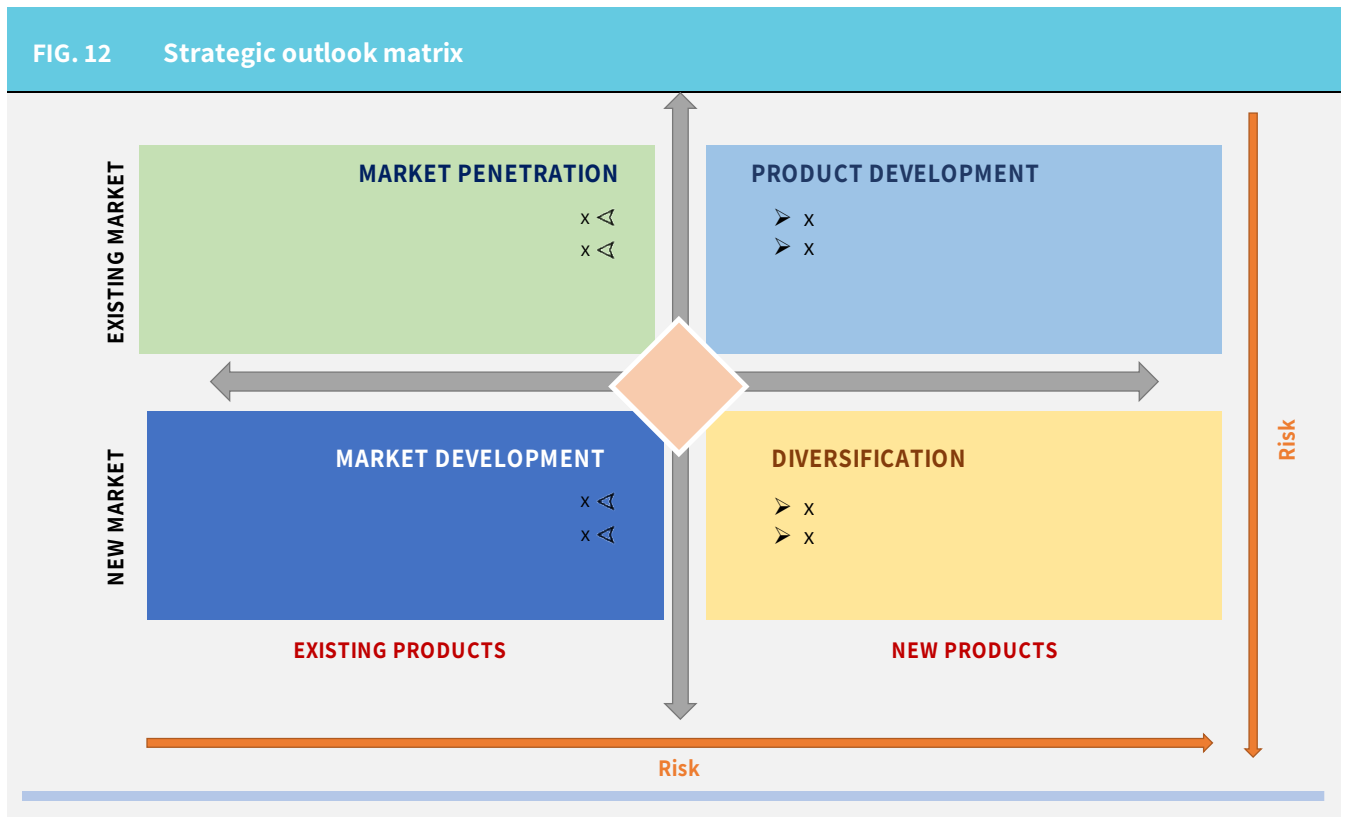
Given below are the classification criteria for categorizing the companies identified into the four quadrants.

TABLE 2 Competitive positioning matrix: Classification criteria

<p>Key Players</p>	<p>These companies rank at the top in the market. They offer their products or services to a broad customer base and are actively involved in the market. Together, these companies account for a majority of the overall market share.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Large market revenue • Strong brand presence • Broad customer base
<p>Promising Leaders</p>	<p>These are similar to the key players but may need more technological advancements to offer their products/solutions to a broader customer base. They typically offer differentiated products to expand their market share.</p>

	<p>Key attributes:</p> <ul style="list-style-type: none"> • Differentiated offerings • Notable market share • R&D investments
Niche Leaders	<p>These companies actively focus on one product or brand and aim to create their space/positioning within a segment.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Specialized in offering one particular service/product • Continued product/market development initiatives within their focus areas
Disruptors	<p>These companies strive to create a market value. They generate new growth opportunities by launching innovative products for market disruption.</p> <p>Key attributes:</p> <ul style="list-style-type: none"> • Strong focus on innovations • Concentrated effort to secure investments

4.4 Strategic outlook matrix



Source: Global Market Insights, Paid Databases, Primary Research

Chapter 5 Motorcycle Market, By Propulsion Type

5.1 Internal combustion engine (ICE)

- Internal Combustion Engine (ICE) segment accounted for a high market share in 2023. This dominance is rooted in the widespread use of traditional combustion engines, valued for their reliability, simplicity, and affordability.
- While electric alternatives gain traction, the established infrastructure, cost-effectiveness, and familiarity of ICE-powered motorcycles keep them at the forefront. Manufacturers continue to refine and optimize internal combustion technology, ensuring its continued stronghold in the market.

TABLE 3 ICE market size, 2018 - 2023 (USD Million)

	2018	2019	2020	2021	2022	2023
USD Million	x	x	x	x	x	x

Source: Global Market Insights, Paid Databases, Primary Research

TABLE 4 ICE market size, 2024 – 2032 (USD Million)

	2024	2025	2026	2027	2028	2029	2030	2031	2032	CAGR (2024–32)
USD Million	x	x	x	x	x	x	x	x	x	x

Source: Global Market Insights, Paid Databases, Primary Research

Please note: The study will provide market size and forecast for all the segments listed in the table of contents.

Chapter 6 Motorcycle Market, By Region

6.1 Asia Pacific

- The ongoing Economic growth in many Asia Pacific countries has led to an increase in disposable income. As people's purchasing power rises, there is an inclination towards personal mobility solutions, including motorcycles.
- Many cities in Asia Pacific face significant traffic congestion, and motorcycles are often seen as a practical and efficient means of transportation, especially for navigating through congested urban areas. Also, motorcycles are often more affordable than cars, making them a popular choice in markets where cost is a crucial factor. Additionally, motorcycles are generally fuel-efficient, which appeals to budget-conscious consumers.

TABLE 5 Asia Pacific motorcycle market size, by type, 2018 – 2023 (USD Million)

Segment	2018	2019	2020	2021	2022	2023
Standard	XX	XX	XX	XX	XX	XX
Sports	XX	XX	XX	XX	XX	XX
Cruiser	XX	XX	XX	XX	XX	XX
Adventure	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Global Market Insights, Paid Databases, Primary Research

TABLE 6 Asia Pacific motorcycle market size, by propulsion type, 2018 – 2023 (USD Million)

Segment	2018	2019	2020	2021	2022	2023
ICE	XX	XX	XX	XX	XX	XX
Electric	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Global Market Insights, Paid Databases, Primary Research

TABLE 7 Asia Pacific motorcycle market size, by engine capacity, 2018 – 2023 (USD Million)

Segment	2018	2019	2020	2021	2022	2023
Under 500cc	XX	XX	XX	XX	XX	XX
500 cc – 1000 cc	XX	XX	XX	XX	XX	XX
Over 1000 cc	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX

Source: Global Market Insights, Paid Databases, Primary Research

Please note: The study will provide market size and forecast for all the segments across each regional and country level markets listed in the table of contents.

Chapter 7 Company Profiles

7.1 Yamaha Motor Co., Ltd.

7.1.1 Business overview

Snapshot	
Headquarters	Japan
Year of Establishment	1887
Employees	19,895 (As of December 2022)
Type	Public company
Traded	FDX (NYSE)
Regional Presence	North America, South & Central America, Asia Pacific, Middle East, Oceania, and Europe
Market value	USD 8.35 Billion (As of March 2023)
Role in the Supply Chain	Transportation and equipment manufacturing company
Business Segments	E-commerce, sales & marketing, IT, solution design, networking, and data management
Subsidiaries	Yamaha Music Manufacturing Japan Corporation, Yamaha Corporation of America, Yamaha Guitar Group, Inc., Yamaha Music Japan Co., Ltd., Yamaha Music Retailing Co., Ltd. and Yamaha Sound Systems Inc.

7.1.2 Financial data

(All numbers are in USD million)

Year	31-December-2022	31-December-2021	31-December-2020	31-December-2019
Filed Currency	JPY	JPY	JPY	JPY
Exchange Rate	0.0076	0.0091	0.0094	0.0092
Total Revenue	17,104.51	16,504.69	13,879.58	15,271.94
Operating Income	1,710.59	1,660.42	765.26	1,058.31
Gross Profit	4,821.04	4,615.31	3,483.83	4,057.78
Revenue, By segment				
Land mobility	11,169.26	10,742.74	8,868.36	10,273.01
Marine Products	3,933.24	3,561.65	3,076.54	3,211.31

Robotics	881.44	1,095.28	777.75	693.93
Financial Services	473.00	442.95	431.56	375.46
Other	647.55	662.05	631.64	718.22
Revenue, By Region				
Japan	1,248.63	1,435.91	1,443.48	1,557.74
Asia	7,012.85	6,766.92	5,551.83	6,643.30
North America	4,327.44	3,911.61	3,372.74	3,420.92
Europe	2,377.53	2,409.68	2,040.30	1,985.35
Others	2,292.00	1,980.56	1,471.24	1,664.64

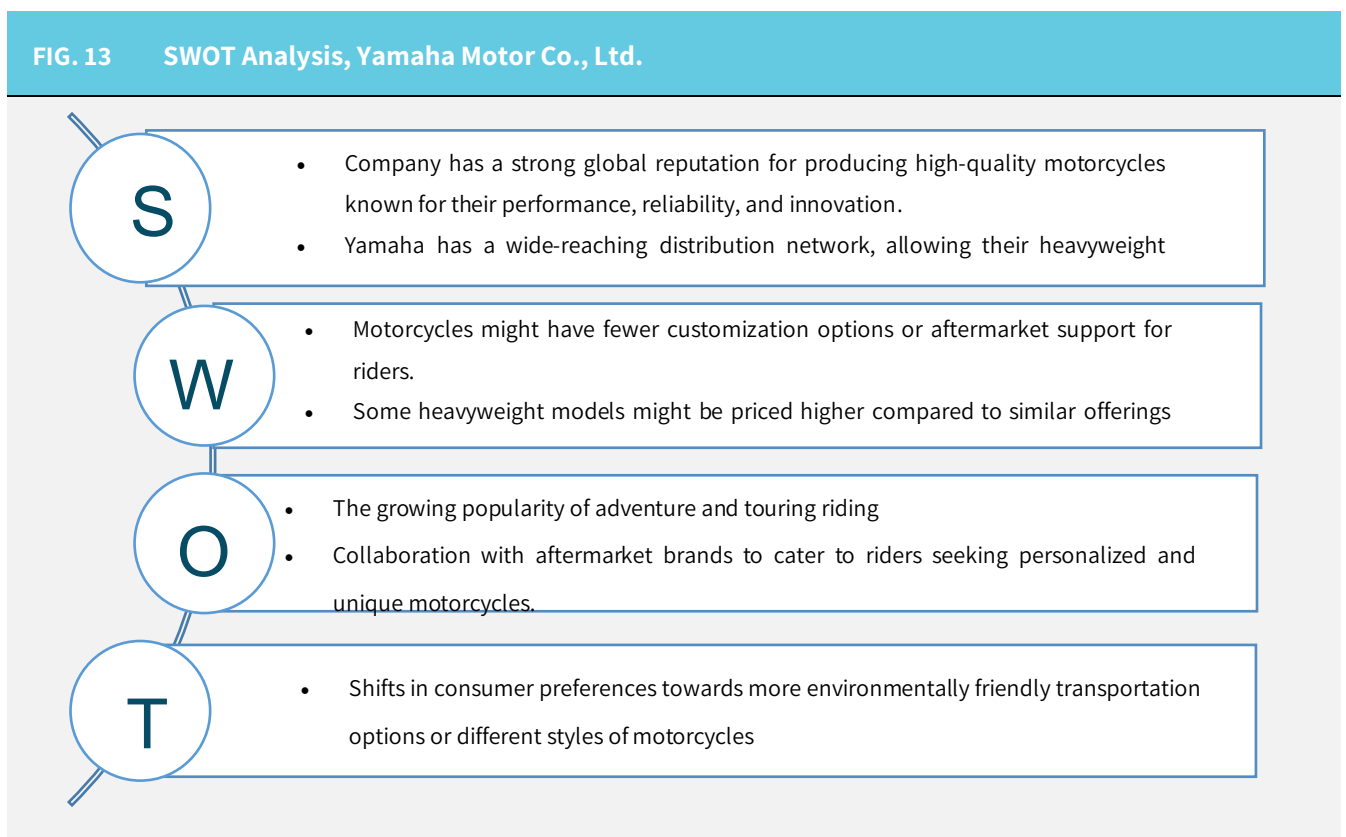
7.1.3 Product landscape

Product/Service	Application/Feature
Motorcycles	
<ul style="list-style-type: none"> • R-Series <ul style="list-style-type: none"> ○ R1 ○ R7 ○ R6 ○ R3 ○ R15 ○ R125 	<ul style="list-style-type: none"> • Revolutionary technical challenges as well as bold styling and design challenges • The fastest machine on twisties and secondary roads • Chassis stability when accelerating, braking, or cornering. • High-quality look that encouraged affinity and fondness from riders • Reliable high performance, lasting durability, and more.
<ul style="list-style-type: none"> • MT Series <ul style="list-style-type: none"> ○ MT-03 ○ MT-07 ○ MT-09 ○ MT-10 ○ MT-15 ○ MT-125 	<ul style="list-style-type: none"> ○ The common theme binding them together is the Torquey & Agile concept. ○ The appeal and presence of the components themselves by paring down the unnecessary, and combining this with the somewhat unreadable expression produced by the headlight assembly lends a mysterious air to the machine. ○ The sound pressure from each has also been tuned for balance and this produces a sensual sound between 4,000 and 8,000 rpm.

7.1.4 Market strategy

Market Strategy	Initiatives
New Product Launch	<ul style="list-style-type: none"> In July 2023, Yamaha Motor Corp. introduced a new SXR900 RACER with a revolutionized technological development in design. This new product has been introduced with Deltabox chassis in their Grand Prix racing machines. Moreover, this will help the company in attracting customers towards heavyweight vehicle segment and enhances the sales.

7.1.5 SWOT analysis



Source: Industry Associations and Journals, Company Annual Reports, Owler Pro, Primary Interviews, Global Market Insights

Chapter 8 Appendix

8.1 Market definitions

- A motorcycle is a two-wheeled motor vehicle powered by an internal combustion engine or electric motor. Motorcycles are designed for personal transportation and are known for their agility, relatively low cost, and fuel efficiency compared to larger four-wheeled vehicles. They typically have a seat or saddle for the rider, sometimes with additional seating for passengers, and are controlled by handlebars for steering.
- Based on **type**, the motorcycle market comprises:
 - **Standard motorcycles**, also known as naked bikes or roadsters, are versatile and all-purpose bikes. They typically feature a straightforward design without extensive fairings or bodywork. Standard motorcycles are known for their upright riding position, making them suitable for commuting, city riding, and casual touring.
 - **Sports motorcycles**, often referred to as sport bikes or supersport bikes, are designed for high-performance and agility. They feature aerodynamic bodywork, aggressive styling, and are optimized for speed and handling. Sports motorcycles are popular among enthusiasts who enjoy spirited riding, track days, and competitive racing.
 - **Cruiser motorcycles** are known for their relaxed, laid-back riding positions and a design that often emphasizes a low-slung, classic appearance. They typically have a V-twin engine configuration, wide handlebars, and a feet-forward riding position. Cruisers are associated with a more comfortable and leisurely riding experience, making them popular for cruising on highways and urban environments.
 - **Adventure motorcycles**, also known as dual-sport or ADV (adventure touring) bikes, are designed for both on-road and off-road riding. They feature a rugged design, long-travel suspension, and upright ergonomics. Adventure bikes are equipped to handle diverse terrains, making them suitable for long-distance touring, adventure riding, and off-road exploration.
- Based on **propulsion type**, the motorcycle market comprises:
 - **Internal Combustion Engine** motorcycles are traditional motorcycles powered by engines that burn a fuel-air mixture within the engine's combustion chamber. The most common type of fuel for ICE motorcycles is gasoline. These motorcycles have been the standard for many years and are still prevalent in the market.
 - **Electric motorcycles**, also known as e-motorcycles or e-bikes, are powered by electric motors and rely on rechargeable batteries for energy storage. These motorcycles are part of the broader electric vehicle (EV) trend, offering a more sustainable and environmentally friendly alternative to traditional internal combustion engine motorcycles.

- Based on **engine capacity**, the motorcycle market comprises:
 - Motorcycles with engine capacities **under 500cc** are often considered entry-level or lightweight bikes. They are suitable for novice riders, urban commuting, and riders who prefer a more fuel-efficient and maneuverable option.
 - Motorcycles with engine capacities between **500cc and 1000cc** cater to a broad range of riders, from those seeking a balance between power and efficiency to those interested in sportier or more touring-oriented bikes. This segment includes a variety of styles, from standard and cruiser to sport and adventure bikes.
 - Motorcycles with engine capacities **over 1000cc** are often considered high-performance or heavyweight bikes. This category includes a range of styles, such as cruisers, sport bikes, touring bikes, and adventure bikes designed for longer rides and highway cruising.

8.2 Available customization

The scope of this research study can be customized to include:

- Additional country-level markets
- Additional / modified industry segments
- Additional company profiles
- Region or country-specific competitive analysis
- Pricing analysis
- Voice of Customer Study
- Brand perception analysis
- Go-to-market strategy
- Partner identification
- Product benchmarking

8.3 Related studies

Motorcycle Accessories Market
Electric Motorcycle & Scooter Market
Premium Electric Motorcycle Market
Slingshot/ 3 Wheeled Motorcycle Market

8.4 Research practices

GMI offers market intelligence through industry clusters that cover a diverse range of sectors, including technology, healthcare, finance, energy, consumer goods, functional foods, and more. By organizing our market intelligence into industry-specific clusters, we ensure that our customers have access to in-depth insight specific to their focus areas. Each cluster comprises multiple reports that delve into market growth opportunities, trends, competitive landscape, and dynamics.

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