Global and China Motorcycle Industry Report, 2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

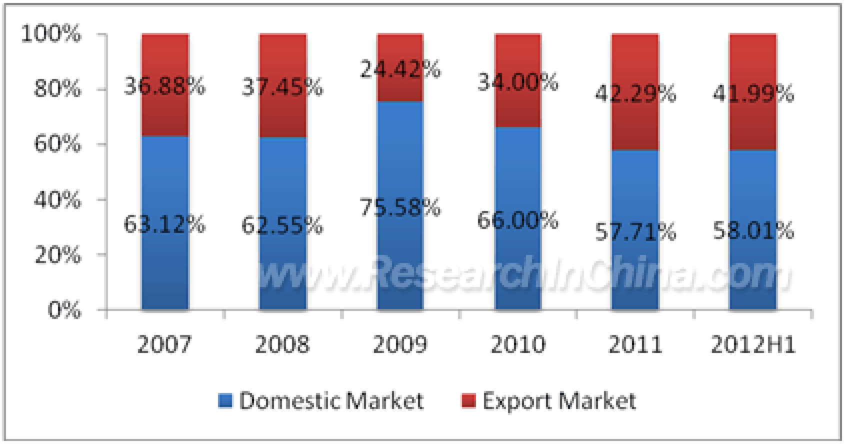
The primary information sources include the China Association of Automotive Manufacturers, National Bureau of Statistics of China and China Customs etc.

Abstract

As the largest motorcycle producer and consumer in the world, China has recently entered an adjustment phase of retracement after more than a decade of rapid growth. On the one hand, under the circumstances of the enforcement of National III emission standards as well as the rising market demand for motor vehicles, electric vehicles and other substitutes, Chinese motorcycle enterprises are facing the pressure of product structure adjustment; on the other hand, as domestic demand growth for motorcycles glides, Chinese motorcycle enterprises have made more efforts to expand export market.

In 2011, China's motorcycle sales volume reached 26.93 million, involving export volume of 11.39 million with a proportion of 42.29%, 8.29 percentage points higher over the previous year. Currently, China's motorcycle export market is primarily concentrated in Asia, Latin America, etc.. In the motorcycle market of these regions, Japanese brands such as Honda, Suzuki, Yamaha and Kawasaki constitute dominant competitors. As the Chinese motorcycle production technology is mainly introduced from Japan, domestic motorcycle manufacturers enjoy no technical advantage in the competition of the export market at all, chiefly dependent on the price competition, which is obviously shown in the motorcycle markets of Vietnam, Indonesia, Brazil and other countries.

Proportions of Domestic Sales and Exports of Motorcycle in China, 2007-2012



Source: China Association of Automobile Manufacturers, General Administration of Customs of the People's Republic of China, ResearchInChina<Global and China Motorcycle Industry Report, 2012>

In terms of the industrial pattern, the Chinese motorcycle industry characterizes not a high concentration degree, still accompanied by fierce market competition. In 2011, top ten Chinese producers accounted for a total of 53.35% of the industry's sales volume, while Jiangmen Dachangjiang Group Co., Ltd. in the first position merely held an 8.98% share. Due to lack of core technologies for engine, competition in domestic motorcycle industry is more reflected in the price competition, leading to a low level of average profit margin at the moment. Against the background of sluggish domestic demand, in the next few years, Chinese motorcycle industry will face a reshuffle and industrial integration is expected to speed up.

Global and China Motorcycle Industry Report, 2012 is mainly divided into two parts. First, to analyze the industrial pattern, major markets, competitive landscape and leading players of global motorcycle industry; second, to analyze the production and marketing scale, competitive structure and major enterprises of China motorcycle industry, as well as to predict the development tendency of the motorcycle market over the next few years.

Jiangmen Dachangjiang Group Co., Ltd., China's largest motorcycle manufacturer, is oriented by home sales. In 2011, the motorcycle export volume only occupied 18.27% of the company's sales volume. Its motorcycle production technology is introduced from Japan-based Suzuki, and the parent company Haojue possesses China's largest motorcycle joint venture with Suzuki, namely, Changzhou Haojue Suzuki Motorcycle Co., Ltd..

Loncin Industries Ltd. is the largest motorcycle exporter in China, with motorcycle export volume accounting for 57.26% of the company's sales volume in 2011. Committed to the diversified development, the company has enriched motorcycle product line in addition to the extension to upstream motorcycle engine product field. Motorcycle production line projects under construction in 2012 primarily include electric motorcycles and electric four-wheel all-terrain motorcycles; meanwhile, the company will further strengthen the production capacity of three-wheel motorcycle.

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