

Analysis of Motorcycle Production and Sales in China in 2021



2021中国机车产销分析

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Production and Sales (Comparing 2020 and 2021)

In December 2021, the production and sales of the whole motorcycle industry in China were 1.7 million and 1.75 million, the production ratio decreased 0.88% month on month, the sales ratio increased 5.33% month on month and the ration decreased 2.9% and 0.05% year on year. Among them, the production and sales of two-wheeled motorcycles were 1,514,200 and 1,562,500, the production ratio decreased 0.18% month on month, the sales ratio increased 6.42% month on month. The production decreased 2.16% year on year and the sales increased 1.26% year on year; The production and sales of tricycle were 187,200 and 187,600 which decreased 6.23% and 2.93% month on month and 8.51% and 9.78% year on year; The production and sales of fuel motorcycles were 1,398,500 and 1,448,000. The production ratio decreased 1.15% month on month and 2.84% year on year and the sales ratio increased 6.52% month on month and 1.19% year on year; The production and sales of electric motorcycles were 303,000 and 302,100. The production ratio increased 0.38% month on month and decreased 3.17% year on year, the sales ratio decreased 0.01% month on month and decreased 5.6% year on year.

From January to December the whole industry completed the production and sales of 20,195,200 and 20,194,800 with a year-on-year increase of 12.98% and 12.7%. Of these, 17.8475 million and 17.8547 million two-wheeled motorcycles were produced and sold, an increase of 14.01% and 13.76% year-on-year ;

2.3477 million and 2.3401 million three-wheeled motorcycles were produced and sold, an increase of 5.76% and 5.21% year-on-year. The production and sales of fuel motorcycles were 16.2363 million and 16.252 million, an increase of 15.52% and 15.21% year-on-year ; the production and sales of electric motorcycles were 3.9589 million and 3.9428 million, an increase of 3.65% and 3.43% year-on-year. Domestic sales of 11.1221 million motorcycles, an increase of 3.62% year-on-year. In December, from the perspective of model details, among the three major models, the production and sales of straddle were 790,900 and 845,700 with a month-on-month decrease of 1.58% in production and sales volume increased 7.71% month-on-month, production decreased by 6.43% year-on-year, and sales increased by 1.13% year-on-year. The production and sales of

scooters were 536,400 and 532,600 with a month-on-month decrease of 0.35% in production and sales increased by 5.53% month-on-month, an increase of 13.04% and 9.21% year-on-year. The production and sales of cub were 187,000 and 184,200 with a month-on-month increase of 6.58% and 3.24% in production and sales, a year-on-year decrease of 17.94% and 15.93%. From January to December, the production and sales of straddle were 9,090,900 and 9,097,400 with an increase of 18.76% and 18.68% year-on-year. The production and sales of scooter were 6,471,000 and 6,478,400 with an increase of 9.58% year-on-year ; and the production and sales of cub were 2,278,500 and 2,227,700 with an increase of 9% and 8.42% year-on-year. **Judging the proportion of the sales volume of each model in the total sales volume of two-wheeled vehicles, the proportion of straddle, scooter and cub models were 50.95 %, 36.28% and 12.48% respectively.**



Motorcycles Market Trend 2021

The motorcycles market is in great shape in China, while deeply involved in the electrification transition which is creating huge space for EVs specialists and narrowing roads for combustion engines specialists.

Although in the last two quarters of 2021 the Chinese economy growth was below expectations, reducing demands for consumer goods, the two-wheeled market continued to perform well, after a roaring first half of the year. The transition to the electrification is very fast and while government subsidies to producers are declining, the huge volumes achieved by segment leaders have already allowed strong economy of scale and the electric scooters are already competitive in terms of pricing and performance. The market is rapidly changing after the proportion of the electric vehicles became more than 50% of the total market last year.

New brands are booming, with **Yadea** being the market leader not only in the EVs segment but also in the entire market, after having scored a milestone reporting over 5 million sales in 2020 and further growth in 2021.

Xinri Sunra. Niu. Luyuan and other brands are fast growing although limited by short supply, while the traditional brands are working to transform the local production for domestic market.

The demand for motorcycles is fast growing, with almost all premium brands (BMW, Triumph, Ducati, KTM, Piaggio, Peugeot and others) reporting record sales in China.

Said this, looking at the market figures, in 2021 the total domestic motorcycles sales (including moped, scooter, underbone, motorcycles tricycles and ATVs) reached 19.5 million, an impressive 9.2% increase.

Looking at the manufacturer ranking, **Yadea** has taken the lead for 3 consecutive years with 6.2 million sales (+15.4%). The Hong Kong based firm had almost tripled sales in China in the last 5 years, while expanding production in ASEAN.

Honda in the 2nd place, which holds several local companies (the leader until three years ago) is now struggling to enter the EVs segment. Last year its sales were 1.35 million (+2.1%).

Haojue in the 3rd place, a “traditional” manufacturer sold near 1.3 million vehicles in the domestic market (+27.1%) last year. Haojue is the top exporter with over 1 million vehicles.

In fourth place the fastest growing manufacturer, the EVs specialist **Niu Tech** reached the sales of 988.000 sales (+72.7%).



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Established in 1993, YUYAO BIAOER is a manufacturing and trading company specializing in EYEBOLT (GB789, DIN444) and HINGE.

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