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Analysis of Motorcycle Production and Sales in EU Region in 2021

欧盟机车产销分析

EU Market Size

In the first nine months of 2021, motorcycle registrations in five of the largest European markets (i.e. France, Germany, Italy, Spain and UK) rose by 10.6% compared to the same period of 2020, totalling 792,819 units. As expected, due to the different impact of COVID-19 disruptions in spring 2020, almost all the main national markets registered volume gains in 2021 compared to the same period in 2020, with Italy showing the biggest increase (+27.9%). UK, Spain and France also performed well, seeing a 13.5%, 8.7% and 8.5% increase, respectively, while in Germany new registrations decreased slightly (-4.9%). The moped segment remained overall steady in the six European moped markets (i.e. Belgium, France, Germany, Italy, the Netherlands and Spain) compared to last year's figures, reaching a total of 206,751 units in the first nine months of 2021 (-0.2% compared to the same period in 2020). For better comparison, considering pre-pandemic registration data, nine months into 2021 the European motorcycle market is showing signs of growth (792,819 units for January-September 2021 against 732,594 units for January-September 2019, representing a 8.2% increase). The moped market follows a similar trend: over the same period of time, with 206,751 units registered, representing a 6.8% increase on a year-on-year basis.¹

Main Brands and Their Numbers²

BMW Motorrad



BMW Motorrad broke its all-time sales record with 194,261 motorcycles delivered last year.

"The fact that we still managed to finish 2021 with this fantastic result for BMW Motorrad not only makes me happy, but also incredibly proud," said Markus Schramm, Head of BMW Motorrad. "It's precisely in times of crisis where you can see how well a team sticks together." Sales were up in Europe and Asia and increased 32 percent in the United States. Unsurprisingly, boxer models like the R 1250 GS and GS Adventure were the major "driving force" once again.

Pierer Mobility: KTM, Husqvarna, and GasGas



Pierer Mobility, the parent company of KTM, Husqvarna, and GasGas, reported an astonishing 332,881 motorcycle sales in 2021, marking the 11th consecutive year of sales records. European and North American buyers accounted for the majority of the uptick. Another factor driving this performance was the explosion in demand for off-road and dual-sport motorcycles during the pandemic, which Pierer's three motorcycle brands were more than happy to supply. More details on Pierer Mobility's performance have been released in early February, but there's no doubt that 2021 was their biggest sales year so far.

Sources:

1. <https://www.acem.eu/registrations-of-motorcycles-in-largest-european-markets-continue-increasing-in-the-first-nine-months-2021-exceeding-pre-pandemic-levels>
2. <https://www.revzilla.com/common-tread/european-motorcycle-manufacturers-set-sales-records-in-2021>
3. <https://www.rideapart.com/news/582696/european-motorcycle-market-q1-2021/#:~:text=Overall%2C%20the%20Euro%20market%20finished,at%20waning%20interest%20among%20consumers.>





Ducati



Ducati also broke its global sales record in 2021 with a final count of 59,447 motorcycles delivered. For reference, Ducati sold 48,042 motorcycles in 2020, and 53,183 in 2019.

“2021 was a magical year for Ducati,” said CEO Claudio Domenicali in a press release. “We delivered over 59,000 motorcycles, a number never achieved before in 95 years of the company’s history. We also won the title of MotoGP Constructors’ World Champion for the second consecutive year, and we started the electric era of our company with the V21L prototype, which foresees the bike will race in the MotoE championship from 2023.”

Unsurprisingly, the United States led global sales with some 9,000 units, followed closely by Ducati’s home market of Italy. Ducati claims the Multistrada V4 was their best-seller. Global sales were additionally boosted by the release of an all-new Monster and an updated Panigale V4. The recently announced DesertX adventure motorcycle arrived late in the year, so it will be interesting to see if it can boost numbers further in 2022.

Motor Bike Key Points for Growth³

By January, 2022, the region experienced a 22-percent spike in two-wheeler sales compared to the same month in 2021. Unfortunately, the buying frenzy fizzled out shortly after, with March, 2022, only improving on March, 2021, numbers by 2.5 percent. Overall, **the Euro market finished Q1 2022 with 341,869 units sold, an eight-percent increase over the first three months of 2021.**

However, the shrinking sales figures could hint at waning interest among consumers. Due to months of high demand and reduced COVID-19 regulations, many manufacturers expected to carry the 2021 momentum into the new year but production remains inconsistent as a result of supply chain shortages and resource challenges. The ongoing conflict between Russia and Ukraine also poses problems for the industry. Many anticipated that economic expansion and electric vehicles replacing petrol-powered counterparts would drive the market in 2022, but Russia’s invasion of Ukraine threw a spanner in the works. Energy prices have spiked in Europe following the conflict, but electric alternatives aren’t yet available on a mass scale. In addition to fuel and energy price increases, fast-growing inflation will also impact consumers’ purchasing power. Separately, brands like BMW and Ducati have already posted positive Q1 2022 sales figures, but **most analysts and forecasters believe that the European market will continue to slide until the Russian and Ukrainian conflict is resolved.** ■

Piaggio Group:

Piaggio, Vespa, Aprilia, and Moto Guzzi



Piaggio hasn’t released 2021 performance figures yet, although a report on the first nine months of the year indicates 430,600 vehicles shipped worldwide, up by 21.7 percent from the same nine-month period in 2020. Aprilia’s new 660 twins and Moto Guzzi’s V85TT contributed to this success.

Triumph

TRIUMPH 2021 was a milestone year for Triumph. Hinckley recently trotted out a special Tiger 900 Rally Pro to celebrate their one millionth motorcycle built since Triumph’s revival in 1990. This comes at the end of “the most successful year in the brand’s entire 120-year history,” according to CEO Nick Bloor. Over 75,000 Triumph motorcycles were registered in 2021.

“Furthermore, we are committed to taking the brand to even greater heights, and with the forthcoming launch of our brand new Tiger 1200, new competition MX and Enduro motorcycles, plus our strategic partnership with Bajaj to create smaller capacity bikes, I am delighted to say that the future for Triumph and its fans across the world will be just as exciting and rich as the last 30 years has been,” Bloor added.

