

2010

**MOTORCYCLE, SCOOTER & ALL-TERRAIN VEHICLE
ANNUAL INDUSTRY STATISTICS REPORT**

FOR THE MODEL YEAR

JANUARY 1ST, 2010 TO DECEMBER 31ST, 2010

FOR FURTHER INFORMATION CONTACT:

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Motorcycle, Scooter and All-Terrain Vehicle Industries

The Motorcycle & Moped Industry Council, founded in 1971, is a national, non-profit, trade association representing the manufacturers and distributors of motorcycles, mopeds, scooters and related products and services in Canada. The Canadian Off Highway Vehicle Distributors Council, founded in 1984, represents the responsible interests of the major manufacturers and distributors of off-road motorcycles and all-terrain vehicles in Canada. The member companies of the MMIC account for approximately 95 percent of all the new on-road motorcycles and scooters sold in Canada, while COHV member companies account for approximately 90 percent of the new all-terrain vehicles and off road motorcycles sold in Canada. The MMIC and COHV are funded entirely by their members and affiliate members and the programs and services they offer.

Over one hundred and thirteen thousand new units of motorcycles, scooters and ATVs were sold during 2010 at an estimated retail value of 1,417,850,000 dollars. ATVs accounted for 49.80 percent of total new units sold while motorcycles and scooters made up the remaining 50.20 percent. By dollar value, new motorcycle sales accounted for 54.50 percent of the total retail value of sales and new ATV sales accounted for 45.50 percent of the total retail value of sales. In 2010, 70.93 percent of new motorcycle and scooter retail sales occurred in the spring and summer from April to September inclusive, and 29.07 percent in the fall and winter combined. New retail sales for ATVs in 2010 were 22.64 percent, 32.29 percent, 25.03 percent, and 20.04 percent for winter, spring, summer and fall respectively. There were approximately 831 authorized motorcycle dealers and 1,046 authorized all-terrain vehicle dealers across Canada in 2010.

Retail Motorcycle Sales

The following statistical information has been compiled using data from actual shipments by MMIC members. MMIC member companies accounted for approximately 95 percent of total motorcycle sales in Canada in 2010.

- MMIC Motorcycle Brands: Aprilia, BMW, Buell, BRP (Spyder), Derbi, Ducati, Harley-Davidson, Honda, Kawasaki, KTM, Moto Guzzi, Peugeot, Piaggio, Suzuki, SYM, Triumph, Vespa, Victory and Yamaha.
- MMIC Year is January 1st - December 31st.

In 2010, the motorcycle business was approximately 772,651,000 dollars at retail. This figure, based on industry estimates, represents a 10.42 percent decrease from the previous year.

New motorcycles represent 80.02 percent of the total value of sales and Parts and Accessories represent 19.98 percent of the total.

Table 1.1 Estimated New Motorcycle Retail Dollar Sales (expressed in \$000?)

	2006	2007	2008	2009	2010
New Motorcycle	918,698	883,938	925,539	693,090	618,256
Parts & Accessories	182,303	195,254	216,096	169,400	154,395
Total	1,101,001	1,079,192	1,141,635	862,490	772,651

Table 1.2 Estimated New Motorcycle Retail Dollar Sales (expressed in % of dollar sales)

	2006	2007	2008	2009	2010
New Motorcycle	83.44	81.91	81.07	80.36	80.02
Parts & Accessories	16.56	18.09	18.93	19.64	19.98
Total	100.00	100.00	100.00	100.00	100.00

Table 1.3 Motorcycle Retail Sales by National Categories

Category	2006	2007	2008	2009	2010
Street	44,863	47,980	52,605	39,007	34,342
Dual Purpose	3,386	4,451	4,640	3,746	3,240
Competition	12,005	11,428	10,549	8,276	7,602
Off-Road Recreation	9,200	8,070	7,731	5,466	4,733
Mini Bike	2,642	1,730	3,314	1,431	946
Scooter	9,976	8,823	10,551	6,161	6,112
Total	82,022	82,482	89,390	64,087	56,975

Table 1.4 Percent Change in Retail Motorcycle Sales by National Category

Category	2007 vs 2006	2008 vs 2007	2009 vs 2008	2010 vs 2009
Street	6.95	9.64	-25.85	-11.96
Dual Purpose	31.45	4.25	-19.27	-13.51
Competition	-4.81	-7.69	-21.55	-8.14
Off-Road Recreation	-12.28	-4.20	-29.30	-13.41
Mini Bike	-34.52	91.56	-56.82	-33.89
Scooter	-11.56	19.59	-41.61	-0.80
Total	0.56	8.38	-28.31	-11.10

Table 1.5 Retail Motorcycle Sales by Engine Displacement 2007-2010

Engine Displacement	2007		2008		2009		2010	
	# of units	% of units	# of units	% of units	# of units	% of units	# of units	% of units
<u>Street Legal</u>								
up to 250 cc	11,089	18.10	14,790	21.82	10,781	22.04	10,881	24.91
251 - 600 cc	6,437	10.51	5,935	8.75	4,228	8.64	3,326	7.61
601 - 750 cc	8,940	14.59	8,884	13.10	6,725	13.75	5,191	11.88
751 - 950 cc	5,684	9.28	5,264	7.78	4,591	9.39	3,231	7.39
951cc and up	29,104	47.51	32,905	48.54	22,589	46.18	21,065	48.21
Total	61,254	100.00	67,778	100.00	48,914	100.00	43,694	100.00
<u>Off-Road</u>								
up to 125 cc	8,724	41.10	9,665	44.76	6,250	41.19	5,119	38.54
126 - 250 cc	8,441	39.76	8,181	37.89	5,890	38.82	5,335	40.17
251cc and over	4,063	19.14	3,748	17.36	3,033	19.99	2,827	21.29
Total	21,228	100.00	21,594	100.00	15,173	100.00	13,281	100.00

Note: Street legal motorcycles includes street bikes, dual purpose motorcycles and scooters

Off-road motorcycles includes competition, off-highway motorcycles and mini bikes

Table 1.6 Retail Motorcycle New Unit Sales

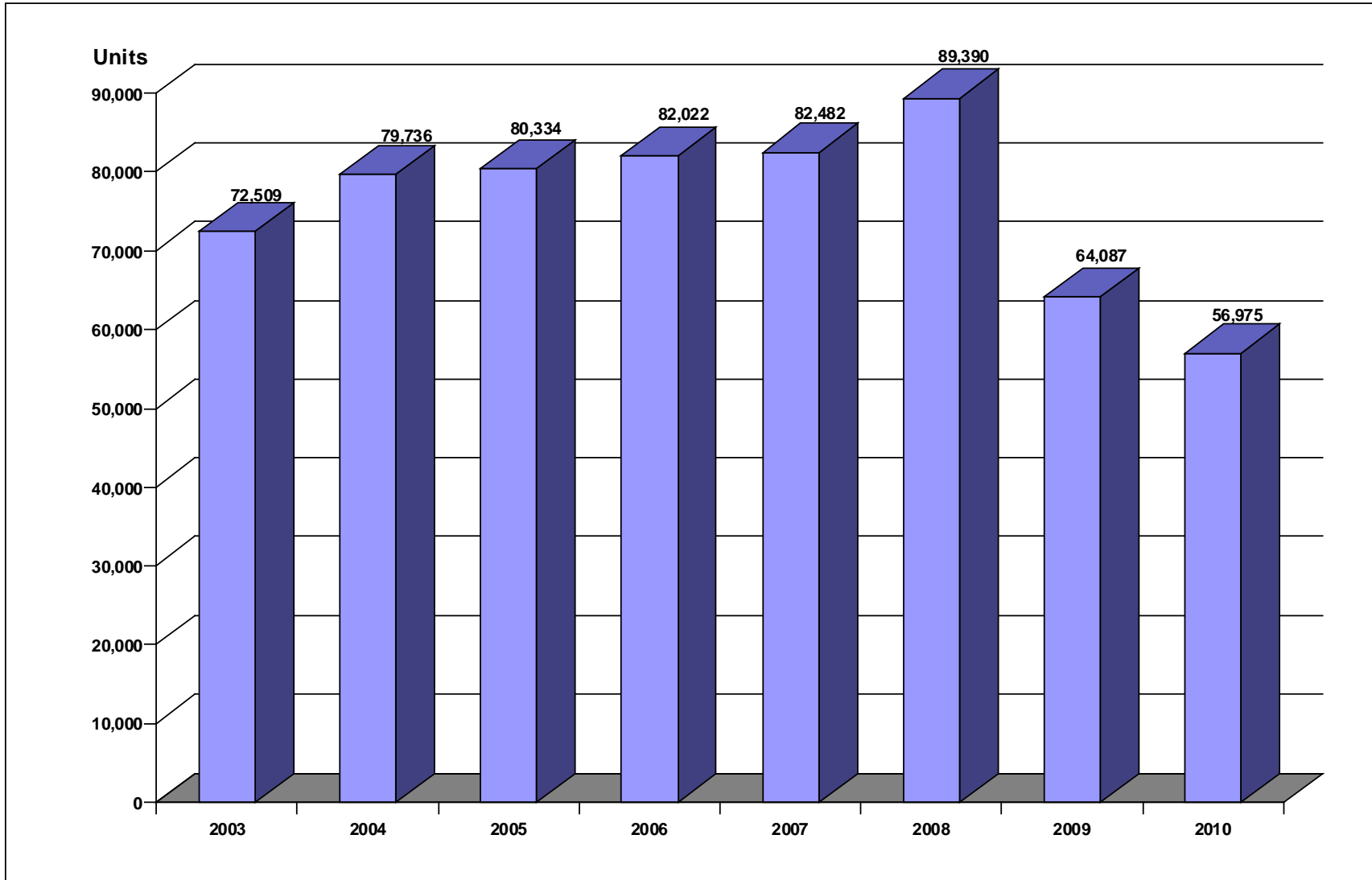


Table 1.7 Retail Motorcycle Sales by Province: (in # of units)

Province	Population in thousands as of July 1 st (2009 Census)	New Unit Sales						
		2004	2005	2006	2007	2008	2009	2010
British Columbia	4,455.2	13,076	13,636	14,015	13,446	14,718	9,885	8,792
Alberta	3,687.7	12,436	13,631	17,069	18,883	19,509	12,676	10,361
Saskatchewan	1,030.1	1,987	2,050	2,282	2,677	3,074	2,606	2,073
Manitoba	1,222.0	2,113	2,081	2,368	2,129	2,208	1,626	1,405
Ontario	13,069.2	20,469	19,935	20,851	20,536	21,714	16,333	13,855
Quebec	7,828.9	23,328	22,433	18,335	17,646	20,397	15,033	15,371
New Brunswick	749.5	2,560	2,477	2,355	2,244	2,311	1,675	1,453
Prince Edward Island	141.0	303	316	365	356	436	279	260
Nova Scotia	938.2	2,114	2,328	2,613	2,495	2,556	1,881	1,585
Newfoundland & Labrador	508.9	1,000	1,189	1,476	1,768	2,061	1,809	1,520
Northwest Territories	43.4	137	112	110	132	194	119	106
Yukon Territory	33.7	97	118	154	157	185	148	149
Nunavut	32.2	21	24	28	13	27	17	45
Exports		95	4	1	0	0	0	0
Total		79,736	80,334	82,022	82,482	89,390	64,087	56,975

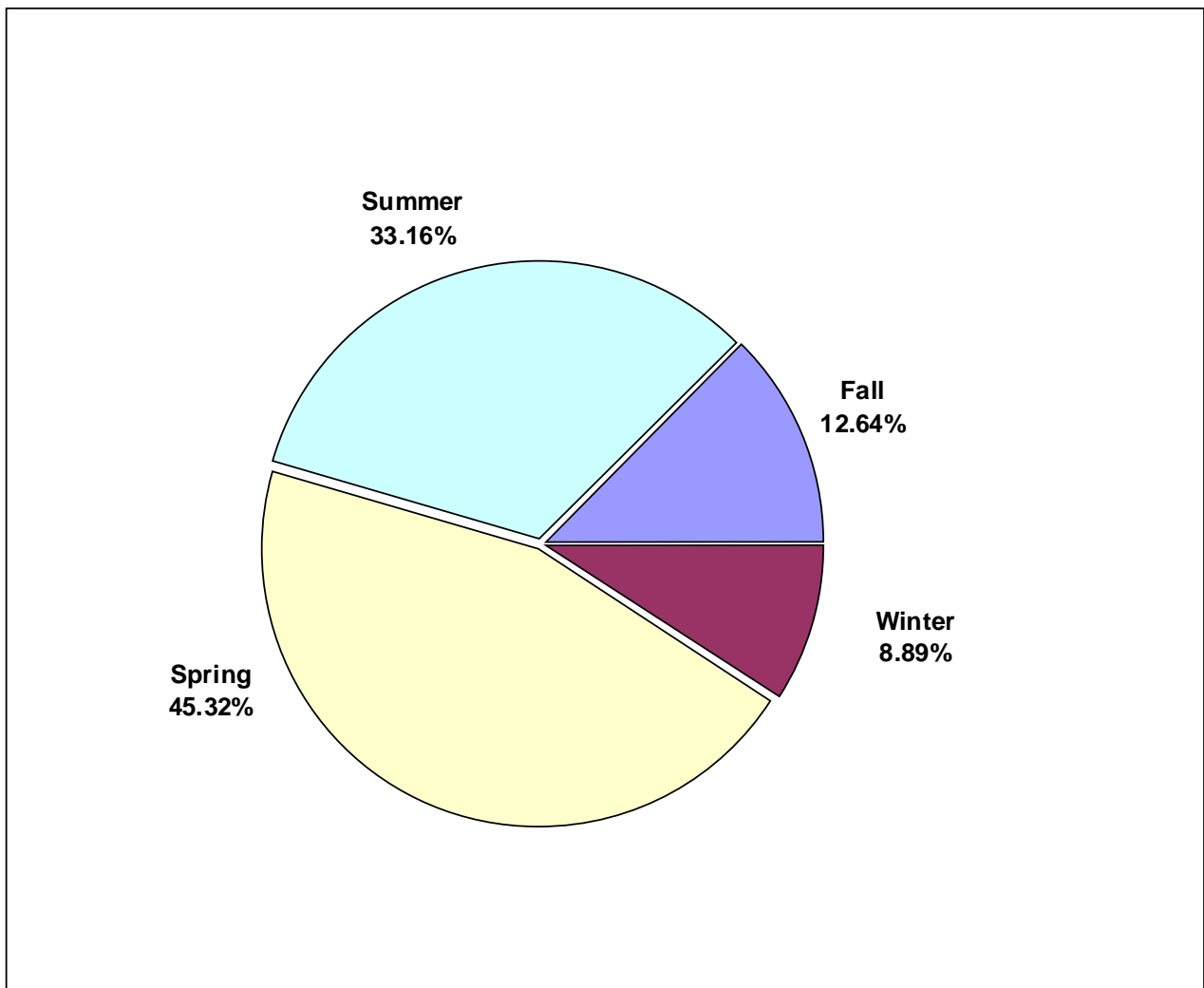
Table 1.8 Retail Motorcycle Sales by Province: (in % of units)

Province	Percent of population in thousands as of July 1 st (2009 Census)	New Unit Sales						
		2004	2005	2006	2007	2008	2009	2010
British Columbia	13.2	16.40	16.97	17.09	16.30	16.46	15.42	15.43
Alberta	10.9	15.60	16.97	20.81	22.89	21.82	19.78	18.19
Saskatchewan	3.1	2.49	2.55	2.78	3.25	3.44	4.07	3.64
Manitoba	3.6	2.65	2.59	2.89	2.58	2.47	2.54	2.47
Ontario	38.8	25.67	24.82	25.42	24.90	24.29	25.49	24.32
Quebec	23.2	29.26	27.92	22.35	21.39	22.82	23.46	26.98
New Brunswick	2.2	3.21	3.08	2.87	2.72	2.59	2.61	2.55
Prince Edward Island	0.4	0.38	0.39	0.45	0.43	0.49	0.44	0.46
Nova Scotia	2.8	2.65	2.90	3.19	3.02	2.86	2.94	2.78
Newfoundland & Labrador	1.5	1.25	1.48	1.80	2.14	2.31	2.82	2.67
Northwest Territories	0.1	0.17	0.14	0.13	0.16	0.22	0.19	0.19
Yukon Territory	0.1	0.12	0.15	0.19	0.19	0.21	0.23	0.26
Nunavut	0.1	0.03	0.03	0.03	0.02	0.03	0.03	0.08
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Table 1.9 Motorcycle Sales by Season: (in % of new unit sales)

Season	2005	2006	2007	2008	2009	2010
Dec – Feb	8.30	9.34	8.07	10.12	8.46	9.03
Mar – May	47.98	45.40	44.11	44.34	45.74	44.34
Jun – Aug	30.96	33.04	34.75	32.61	33.63	33.94
Sep – Nov	12.76	12.21	13.07	12.93	12.17	12.69
Total	100.00	100.00	100.00	100.00	100.00	100.00

Table 1.10 Retail Motorcycle Sales by Season (2005 – 2010 Average)



Retail ATV Sales

The following statistical information has been compiled using data from actual shipments by COHV members. COHV member companies account for over 90 percent of total ATV sales in Canada.

- COHV all-terrain vehicle brands: Arctic Cat, BRP (Can Am), Honda, Kawasaki, KTM, Polaris, Suzuki, and Yamaha
- COHV Model Year January 1st – December 31st.

In 2010, sales of new all-terrain vehicles were approximately 645,199,000 dollars at retail based on industry estimates.

Table 2.1 Estimated ATV Retail Dollar Sales: (expressed in \$000?)

2004	2005	2006	2007	2008	2009	2010
670,910	670,288	1,143,831	1,084,377	872,759	659,445	645,199

Table 2.2 Retail ATV New Unit Sales

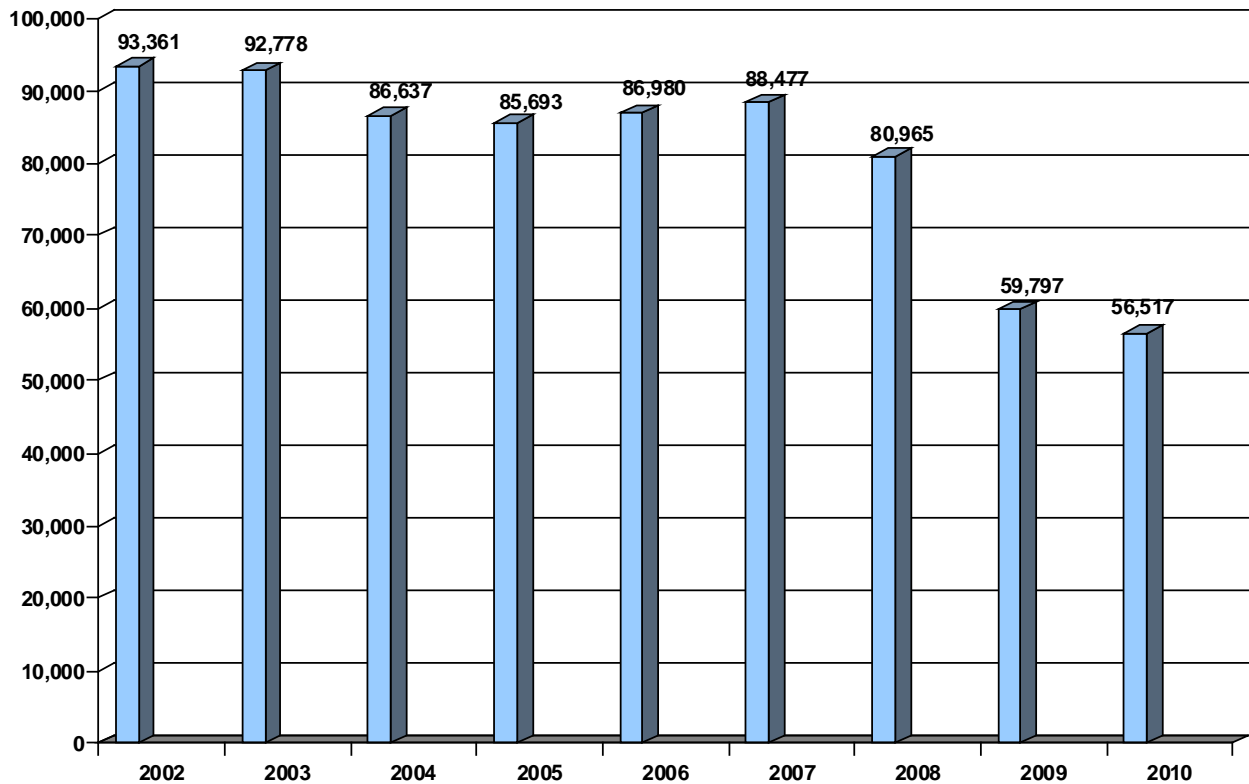


Table 2.3 Retail ATV Sales by Province: (in # of units)

Province	New Unit Sales							
	Population in thousands as of July 1 st 2009	2004	2005	2006	2007	2008	2009	2010
British Columbia	4,455.2	6,359	7,523	8,212	8,675	8,368	5,302	4,808
Alberta	3,687.7	16,172	19,483	23,438	22,100	17,935	10,691	9,734
Saskatchewan	1,030.1	3,807	4,253	5,332	5,413	5,747	4,593	3,998
Manitoba	1,222.0	3,585	3,800	3,695	3,673	3,747	3,294	2,914
Ontario	13,069.2	21,057	19,687	18,356	18,076	17,160	12,952	12,513
Quebec	7,828.9	24,076	21,175	20,160	21,532	19,193	15,792	15,103
New Brunswick	749.5	3,988	3,309	3,160	2,925	2,764	2,224	2,314
Prince Edward Island	141.0	274	288	237	190	223	161	159
Nova Scotia	938.2	3,362	2,910	1,994	1,460	1,589	1,313	1,291
Newfoundland	508.9	3,313	3,014	3,399	3,358	3,032	2,643	2,767
Northwest Territories	43.4	358	299	311	360	383	248	233
Yukon Territory	33.7	319	317	305	357	282	241	218
Nunavut	32.2	417	425	405	358	542	343	465
Total	33,739.9	87,187	86,485	89,006	88,457	80,965	59,797	56,517

Table 2.4 Retail ATV Sales by Province: (in % of units)

Province	New Unit Sales							
	Percent of Population as of July 1 st 2009	2004	2005	2006	2007	2008	2009	2010
British Columbia	13.2	7.29	8.70	9.23	9.80	10.34	8.87	8.51
Alberta	10.9	18.55	22.53	26.33	24.98	22.15	17.88	17.22
Saskatchewan	3.1	4.37	4.92	5.99	6.12	7.10	7.68	7.07
Manitoba	3.6	4.11	4.39	4.15	4.15	4.63	5.51	5.16
Ontario	38.8	24.15	22.76	20.62	20.43	21.19	21.66	22.14
Quebec	23.2	27.61	24.48	22.65	24.34	23.71	26.41	26.72
New Brunswick	2.2	4.57	3.83	3.55	3.31	3.41	3.72	4.09
Prince Edward Island	0.4	0.31	0.33	0.27	0.21	0.28	0.27	0.28
Nova Scotia	2.8	3.86	3.36	2.24	1.65	1.96	2.20	2.28
Newfoundland	1.5	3.80	3.48	3.82	3.80	3.74	4.42	4.9
Northwest Territories	0.1	0.41	0.35	0.35	0.41	0.47	0.41	0.41
Yukon Territory	0.1	0.37	0.37	0.34	0.40	0.35	0.40	0.39
Nunavut	0.1	0.48	0.49	0.46	0.40	0.67	0.57	0.82
Total	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Table 2.5 Retail ATV Sales by Season: (in % of new unit sales)

	2005	2006	2007	2008	2009	2010
Sep – Nov	23.90	24.30	23.62	24.85	23.88	23.79
Dec – Feb	16.31	16.55	19.63	15.70	16.10	16.81
Mar – May	34.73	34.26	33.60	34.83	33.35	34.75
Jun – Aug	25.06	24.89	23.16	24.63	26.66	24.64
Total	100.00	100.00	100.00	100.00	100.00	100.00

Table 2.6 Retail ATV Sales by Season: (2005 - 2010 Average)

