



IMCO Public Hearing:
Clear Internal Market Rules for
Mopeds, Scooters and Motorcycles

Session 3: How to ensure a proper implementation of the new regulation? The motorcycle industry perspective

Antonio Perlot
Public Affairs Manager
ACEM

Association des Constructeurs Européens de Motocycles
The Motorcycle Industry in Europe
www.acem.eu



ACEM:

- 12 moped & motorcycle manufacturers (including extra-EU)
- The main Tricycle and Quadricycle manufacturers
- More than 30 brands
- 90% of EU production; 80% of EU market
- 16 national industry associations in 14 countries representing smaller manufacturers (including SMEs)
- See www.acem.eu





The new regulation towards 2020: ACEM supports the overall goals.

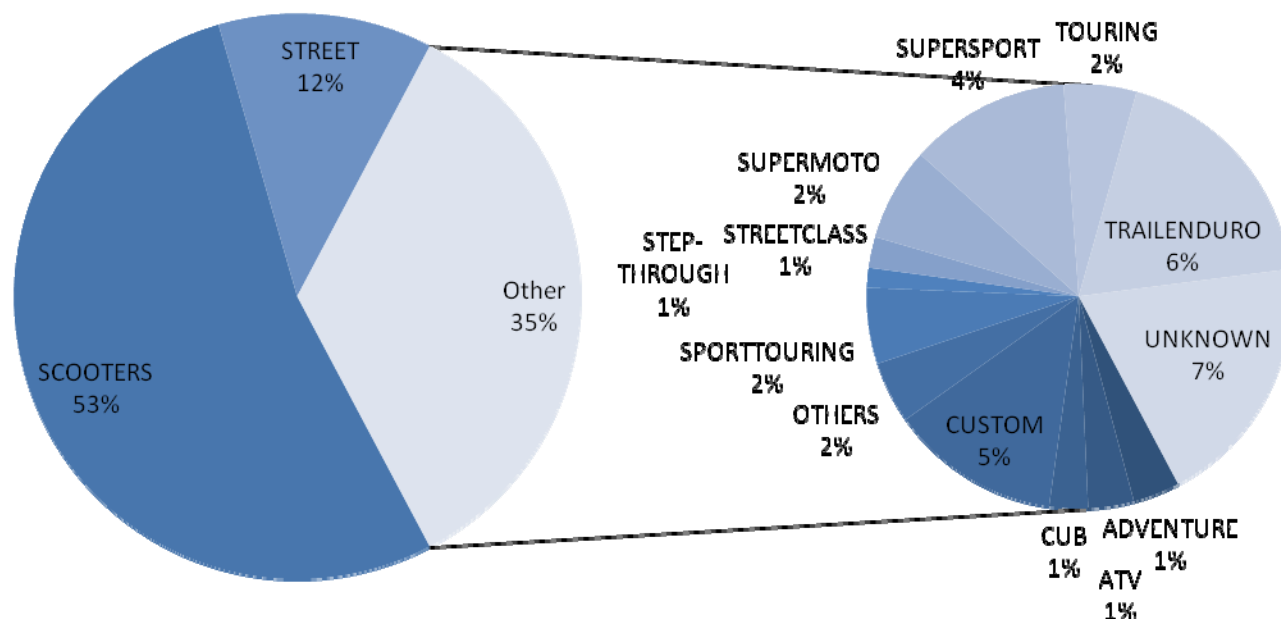
EC Goals	Impact on manufacturers/suppliers	Effects
Long term: simplification	Short & medium term: higher complexity (also for Member States)	Type-approval/Costs
New environmental vehicle requirements	Technical/production/market challenge	Design/R&D/Costs
New safety vehicle requirements	Technical/production/market challenge	Design/R&D/Costs
New administrative requirements	Technical/administrative challenge (also for MS)	Logistics/Costs

**... but several challenges are present: technical, economical...
Lead-time and calendar are fundamental for the feasibility of the measures and to contain impacts on the sector and consumers**

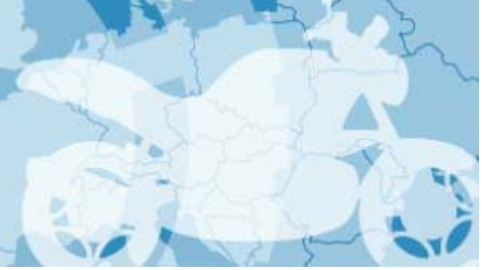


Style Distribution: Scooter Style Keeps the Lead

2010 style distribution



- Scooters, the majority of the market (mostly small capacity vehicles, 1000 – 3000€ consumer price)
- Followed by Street models



Lead-time & Calendar

Average PTW model lifecycle

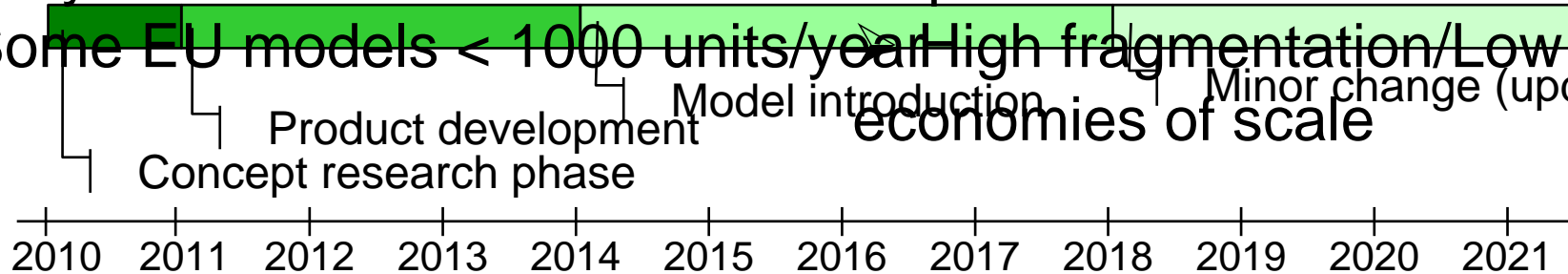
- Many concepts >10 years in different models
- 3 to 4 years without change
- Best selling EU model < 20000 units/year
- Many EU models volume < 5000 units/year

Average PTW Mfr typical line-up

- up to 30 different engines
- 20 to 40 different models
- Due to different usage purposes
- Due to different licensing requirements

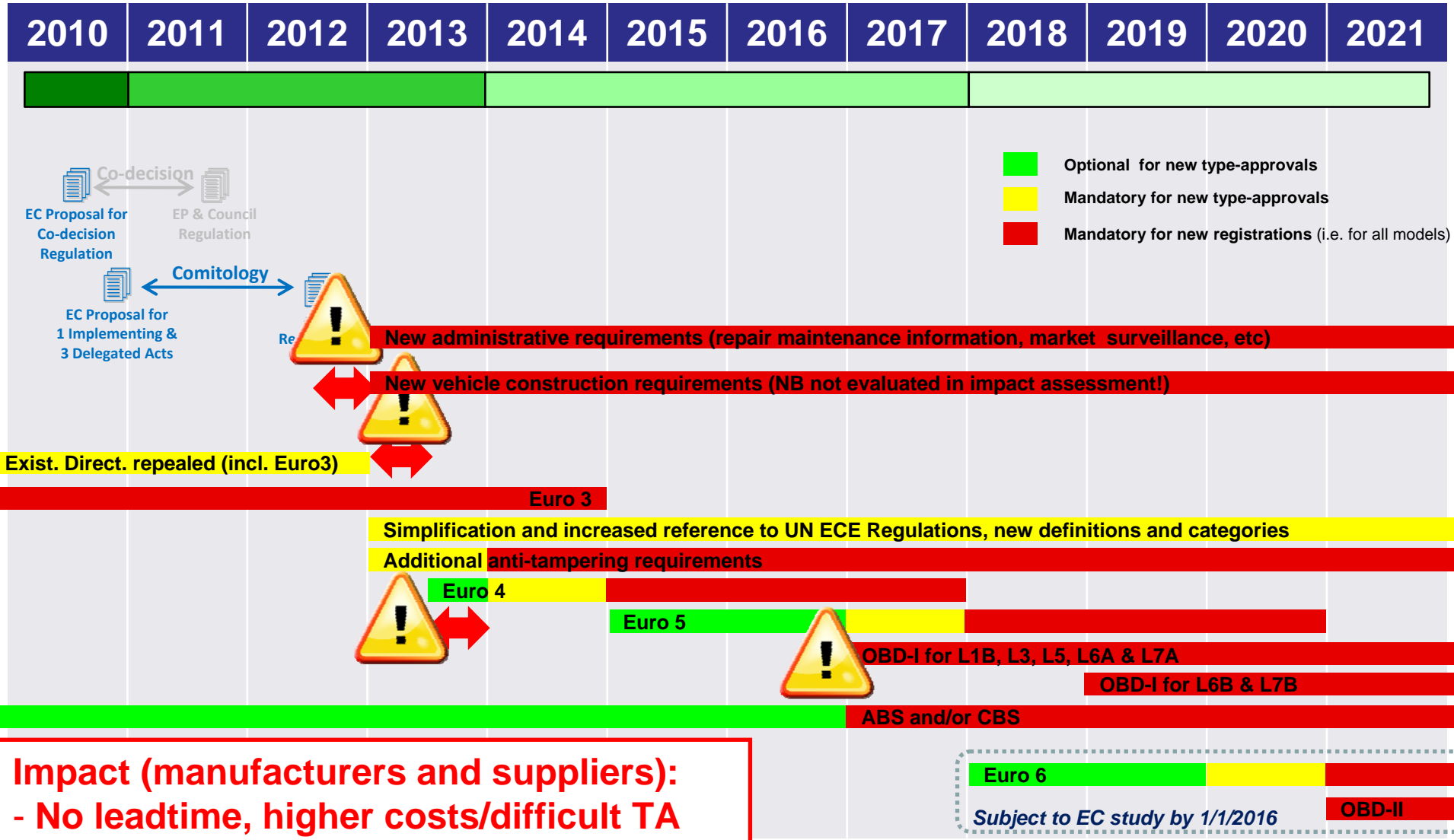
➤ Some EU models < 1000 units/year

High fragmentation/Low economies of scale





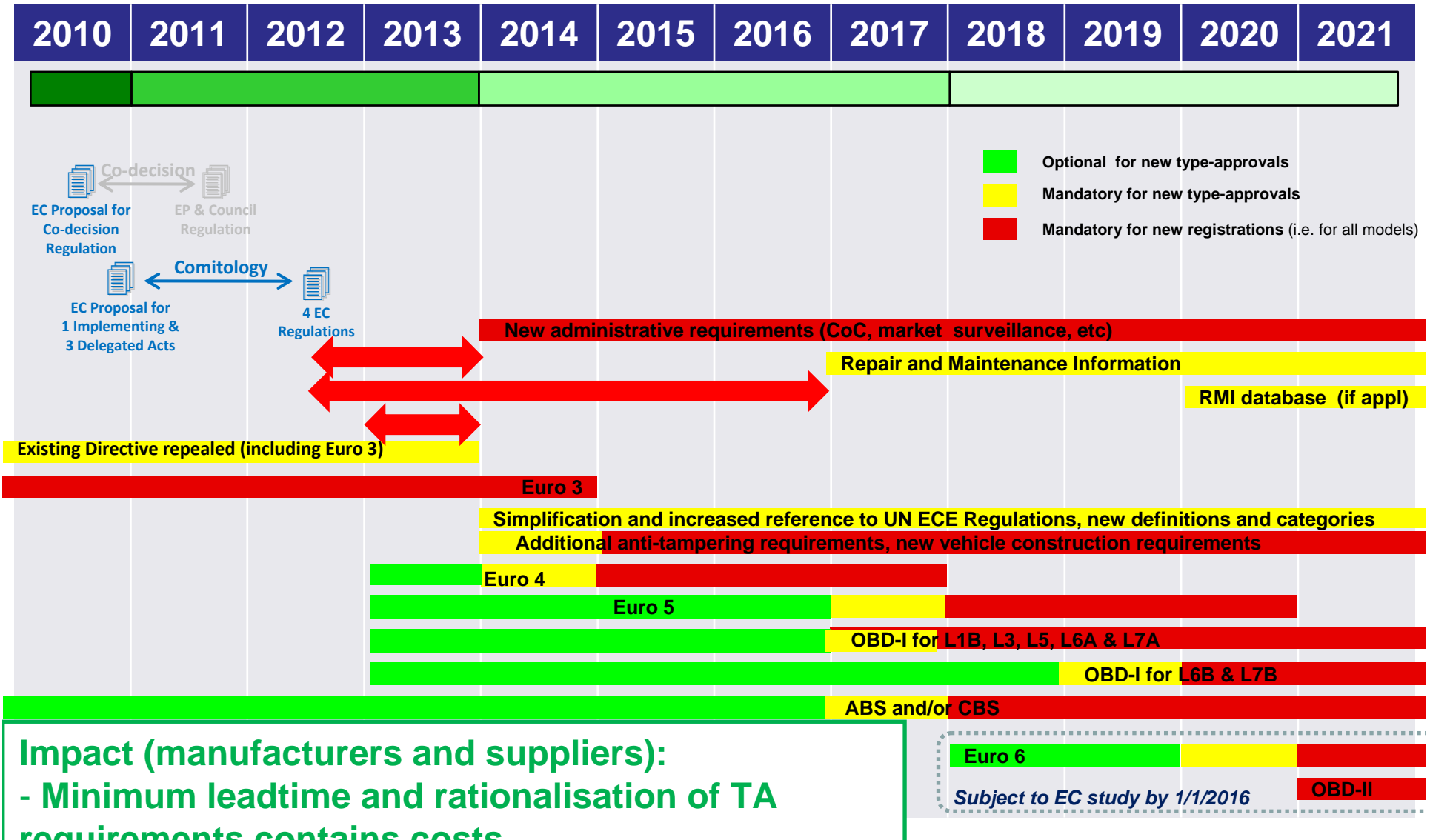
Timeline: EC proposal COM(2010) 542



Impact (manufacturers and suppliers):
 - No leadtime, higher costs/difficult TA management



Timeline: ACEM proposed amendments COM(2010) 542

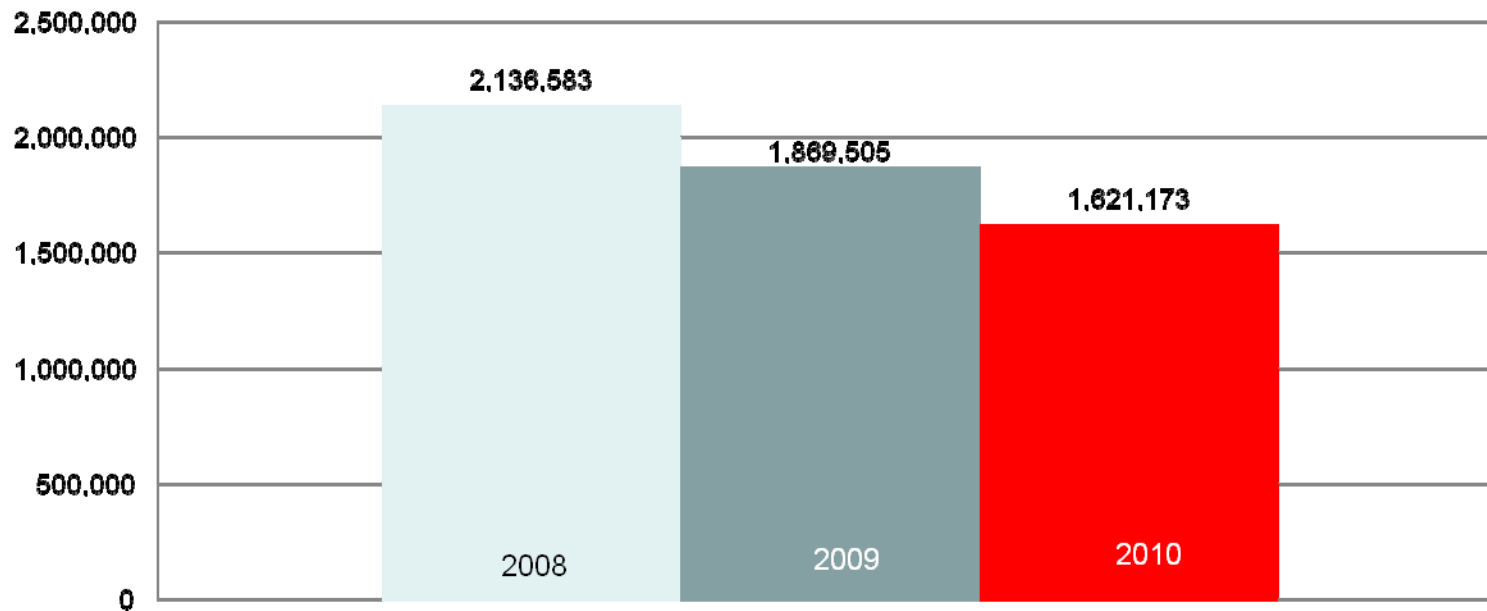


Impact (manufacturers and suppliers):
 - Minimum leadtime and rationalisation of TA requirements contains costs



Severe Impact of the Crisis

EU market - comparisons 2008, 2009, and 2010



- Industry loses about one quarter million units every year
- Half million units since 2008 (-25%), no sign of recovery in 2011
- High pressure on manufacturers, component suppliers and distribution
- Critical importance of leadtime in upcoming EP & Council regulation !!!



Thank you for your attention

Antonio Perlot
Public Affairs Manager
ACEM - The Motorcycle Industry in Europe

1 avenue de la Joyeuse Entrée
B - 1040 Bruxelles
Tel. +32 2 230 97 32
Mobile +32 475 789 143
a.perlot@acem.eu