

October 2018

Green Book Editorial

New Market

The latest MCIA new registration figures for August make for better reading with the total powered two wheels up by 9.1% against the same month last year. The year to date total is also positive at 2%, or 1,492 more units at 7,481. There are a few real stand out points in the categories, particularly Scooter with saw the month 28.4% higher than 2017, with 1,620 being close to a quarter of the months number, although the Y-T-D is only slightly more than the Motorcycle growth, which is at 3.7%. Perhaps the increase is after a bad year in 2017 with the Euro 3 pre registrations still hanging around? The two touring groups on the face of it look like they are having a good time percentage wise, but as the numbers of sold units are small, it doesn't take a lot more to do that. Perhaps there is an effect from the schemes doing the rounds and if it is it does not appear to be working for the Supersport's even if the month decline of 7.9% is less than the Y-T-D loss of 16.2%.

August 2018 and Year to Date - New Registrations by Style

Mopeds	Registrations			Market Share (%)		Year to date		YTD	Market Share (%)	
	Aug-18	Aug-17	Change	Aug-18	Aug-17	2018	2017	% Change	2018	2017
Scooter	438	517	-15.3%	86.6%	87.2%	2,859	3,851	-25.8%	83.5%	88.1%
Other	68	76	-10.5%	13.4%	12.8%	567	522	8.6%	16.5%	11.9%
Totals	506	593	-14.7%	100.0%	100.0%	3,426	4,373	-21.7%	100.0%	100.0%

Motorcycles	Registrations			Market Share (%)		Year to date		YTD	Market Share (%)	
	Aug-18	Aug-17	Change	Aug-18	Aug-17	2018	2017	% Change	2018	2017
Adventure Sport	960	1,003	-4.3%	13.9%	16.2%	12,668	12,733	-0.5%	17.9%	18.6%
Custom	588	591	-0.5%	8.5%	9.5%	6,412	5,828	10.0%	9.0%	8.5%
Naked	2,569	2,154	19.3%	37.1%	34.7%	24,105	22,182	8.7%	34.0%	32.5%
Scooter	1,620	1,262	28.4%	23.4%	20.4%	13,117	12,575	4.3%	18.5%	18.4%
Sport/Tour	174	137	27.0%	2.5%	2.2%	2,322	2,276	2.0%	3.3%	3.3%
Supersport	510	554	-7.9%	7.4%	8.9%	5,951	7,103	-16.2%	8.4%	10.4%
Touring	117	104	12.5%	1.7%	1.7%	1,874	1,690	10.9%	2.6%	2.5%
Trail/Enduro	333	374	-11.0%	4.8%	6.0%	4,253	3,862	10.1%	6.0%	5.7%
Unspecified	53	21	152.4%	0.8%	0.3%	173	80	116.3%	0.2%	0.1%
Totals	6,924	6,200	11.7%	100.0%	100.0%	70,875	68,329	3.7%	100.0%	100.0%

Tricycles	Registrations			Market Share (%)		Year to date		YTD	Market Share (%)	
	Aug-18	Aug-17	Change	Aug-18	Aug-17	2018	2017	% Change	2018	2017
Scooter	30	41	-26.8%	0.4%	0.6%	286	362	-21.0%	0.4%	0.5%
Other	21	22	-4.5%	0.3%	0.3%	184	215	-14.4%	0.2%	0.3%
Total Registrations	51	63	-19.0%	0.7%	0.9%	470	577	-18.5%	0.6%	0.8%

Summary	Registrations		%	Market Share (%)		Year to date		YTD	Market Share (%)	
	Aug-18	Aug-17	Change	Aug-18	Aug-17	2018	2017	% Change	2018	2017
Total Moped, Motorcycle & Tricycles (exc Scooters)	5,393	5,036	7.1%	72.1%	73.5%	58,509	56,491	3.6%	78.3%	77.1%
Total Scooters	2,088	1,820	14.7%	27.9%	26.5%	16,262	16,788	-3.1%	21.7%	22.9%
Total Registrations	7,481	6,856	9.1%	100.0%	100.0%	74,771	73,279	2.0%	100.0%	100.0%

Better news in the engine size table is with the exception of the continued losses in the Moped market, the others are in a gain situation for the month, including 651-1000cc going against the Y-T-D grain where it is -9.4%.

August 2018 and Year to Date - New Registrations by Engine Band

Engine Band	Registrations		%	Market Share (%)		Year to date		YTD	Market Share (%)	
	Aug-18	Aug-17	Change	Aug-18	Aug-17	2018	2017	% Change	2018	2017
0-50cc	525	612	-14.2%	7.0%	8.9%	3,599	4,466	-19.4%	4.8%	6.1%
51-125cc	2,905	2,574	12.9%	38.8%	37.5%	22,794	21,198	7.5%	30.5%	28.9%
126-650cc	1,354	1,153	17.4%	18.1%	16.8%	14,255	11,739	21.4%	19.1%	16.0%
651-1000cc	1,546	1,412	9.5%	20.7%	20.6%	18,224	20,117	-9.4%	24.4%	27.5%
Over 1000cc	1,151	1,105	4.2%	15.4%	16.1%	15,899	15,759	0.9%	21.3%	21.5%
Total Registrations	7,481	6,856	9.1%	100.0%	100.0%	74,771	73,279	2.0%	100.0%	100.0%

The rest of the tables are generally kicking up a similar picture to most months, apart from the appearance of not one but two Royal Enfield models! Pre-reg and demonstrators?

August 2018 and Year to Date - Highest Registering Model by Style

Mopeds	Highest Registering Model by style	Aug-18
Scooter	Lexmoto ECHO 50	60
Other	Derbi SENDA XTREME SM	10

Motorcycles	Highest Registering Model by style	Aug-18
Adventure Sport	Royal Enfield HIMALAYAN	66
Custom	Keeway SUPERLIGHT	45
Naked	Honda CB 125 R	112
Scooter	Honda PCX 125	168
Sport/Tour	Kawasaki Z1000 SX	72
Supersport	Yamaha YZF R125 ABS	80
Touring	BMW R 1200 RT	17
TRAIL/ENDURO	KTM 300 EXC TPI	32

Tricycles	Highest Registering Model by style	Aug-18
SCOOTER	Piaggio MP3 500 LT SPORT ABS	7
OTHER	Can-Am SPYDER F3 1330 ACE	7

August 2018 - Highest Registering Model by Engine Size

Engine Band	Highest Registering Model by Engine Band	Aug-18
0-50cc	Lexmoto ECHO 50	60
51-125cc	Honda PCX 125	168
126-650cc	Royal Enfield BULLET CLASSIC EFI	106
651-1000cc	Yamaha MT-07 ABS	74
Over 1000cc	Kawasaki Z1000 SX	72

August 2018 - New Registrations by Brand

Major Brands	Aug-18
Honda	1,259
Yamaha	919
Triumph	500
Lexmoto	462
Suzuki	431
Kawasaki	398
KTM	391
BMW	363
Harley-Davidson	328
Piaggio	262

Used Market

Although the summer we had was a good one at one moment in time did not carry on as some predictions hinted at, turning into just a reasonable one, the pattern of activity and sentiment around the dealers is similar to what can be reasonably expected at this time of the yearly cycle. There is still some activity, with bikes still moving around, but although trade buyers are continuing to buy, the models being bought are quite rightly the ones where there is confidence that a new home can be found reasonably quickly. One eye is being kept on stock levels in the knowledge that the wrong choice will have staff pushing it around the dealership for several months before any sort of interest starts again. As the last quarter is upon us already there is the usual statement being heard, “behind book”, that is on most lips as the nights draw in. Through the next few weeks there will be the lucky ones who have the cash flow that allows them to buy next year’s stock at the inevitably lower prices. This has become more important to get a jump on the competition as the continued removal of motorcycles from these shores is still there. Even though there is a reduced amount of available bikes in the country, the prices still do lower at the latter end of the year, even though the difference is not to the extremes we would have seen ten years ago, it is still there and has been reflected in a widespread way in this month’s edition.

Auction

At this time of year there is the upcoming slower months in the forefront of most minds with control and the amount of money invested in stock being a major priority. Consequently a glance around most dealerships will find units that have not sold, consisting of all types and condition, so the obvious choice will be for the lower quality, duplicates or slower selling ones to be disposed of. There has been a noticeable increase in the amount of dealer entries at both dedicated auctions over this research period. The problem with bikes bought over the summer period is that there is a high chance that more will have been paid for

them than they will realise in auctions at the start of price relaxation time. This is reflected in the reserves set, in the hope of little or no loss they have much less chance of selling. So the effect on the analysed results come as no surprise, MAG at Rotherham sold half of entries and BCA sold just over half of the 150 entries. With an overall 98% of CAP (adjusted for miles/condition) at MAG and with high buying fees BCA returned 92%. Selling 119 from the 218 on offer (55%). Attendance was lower than average at both sales with more bikes on offer than normal.

End Notes

The Motorcycle Action Group has won what it describes as a landmark campaign to gain exemption for motorcycles of all ages from Birmingham City Council's Clean Air Zone (CAZ). Director of campaigns and political engagement Colin Brown at has said "We are delighted that our campaign has resulted in the proposal to exempt all motorcycles from charges in the zone. This is a decision that will impact riders not just in Birmingham, but throughout the country. Birmingham City Council has recognised and accepted our position that motorcycles are net reducers of harmful emissions and thus should be exempt from charges. "I have found Birmingham City Council to be informed, serious about its emissions policy development and capable of understanding the science. Credit to the council for taking such a mature view". Let's hope other proposed schemes have a similar outlook on PTW in cities, not just clean air but the smaller footprint on the roads and also provide secure parking to facilitate easier use in town centres.

Brexit is a conversation that continues to rear its head in whatever walk of life people are in. There are lots of experts, particularly with social media keyboard warriors and none of the 20 million different opinions on brexit doing the rounds are pointing in a direction that can be followed in making a decision to the direction the motorcycle industry will take.

The Single Market allows the free movement of goods, services, people and money within the EU without restrictions or additional taxes. We can buy European manufacturers offerings without paying extra tax just as they can with the likes of Triumph and Norton. But many of the Japanese manufacturers have European hubs distributing to the member countries, how will this change? Will there be extra tariffs? Will there be customs checks? Are trade deals going to be done enabling importing with manufacturers from other countries we currently receive bikes from? All this will affect prices that will also move down the food chain to used bikes. And on the subject of used bikes, will the Euro Zone buyers still be able to buy stock in the way they have in the last ten years? All as yet are unknown and conversations with others in the industry are not clearing the fog. On the hobby part tied into our industry, riding abroad is part of what some leisure riders enjoy. Will UK riders still be able to travel freely, without a visa, or will driving licences be valid or insurance work as it does now with a green card, across borders?

More politics getting in the way of motorcycling and perhaps little surprise to many is the latest involvement of the President of the USA. Harley-Davidson suggested it will move some of its production elsewhere to get around European tariffs on American-made motorcycles. In response President Donald Trump has criticised the brand as usual via Twitter, claiming that his administration is talking to other motorcycle companies.

Strange happenings in bike sport over the last few weeks with the domestic MotoGP round at Silverstone being cancelled due to inclement weather, or more the track not being able to deal with it. In the fallout from it Dorna has announced that there has been plans in place to stop a wash-out cancellation ever happening again in the Premier Class, if they cannot race on Sunday then it will be run on the Monday or the Tuesday. And perhaps even more bizarre was the Romano Fenati incident, followed by dismissal from the team, cancelation of 2019 ride and eventually announcing his retirement from racing. His brake-grab incident at the Misano Moto2 race at 130mph resulted in criticism from pundits, fans, in fact the whole sport and the Italian Motorcycle Federation taking his racing license and even the beginning of court proceedings against the rider with a hearing involving attempted murder!

To finish on a positive involving the two-wheeled world disabled fundraiser Claire Lomas MBE, she completed a lap of Silverstone at the BSB round on a specially adapted Ducati supplied SuperSport S and plans to ride at every circuit on the BSB calendar. After being paralysed from the chest down by a horse riding accident 11-years-ago, Claire set herself the motorcycling challenge after her plan to ride a lap of the 37.73 mile TT course at the Manx Grand Prix was cancelled by event organisers, Claire turned to Twitter in search of a replacement charitable activity and was contacted by BSB Series and Race Director Stuart Higgs. Claire had her first taste of motorcycling after her accident through the charity The Bike Experience, who help disabled riders get back on two wheels and has already raised £660,000 doing a number of things most of would not even think of doing. The plan is to continue into 2019 with the aim of doing a lap of all the BSB circuits. <https://www.clareschallenge.co.uk/>