

Two Wheeler Market in India 2019

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Abstracts

The Indian automobile sector is experiencing a slowdown since September 2018, which is likely to ease by the second half of FY 2020. The Indian government's unforeseen announcements regarding the norms of BS-VI transition and the electrification of two-wheelers by 2025 have made the market volatile. However, the automobile sector is expected to recover by mid-FY 2021 as per speculations of industrial experts.

MARKET INSIGHT

The two-wheeler market has witnessed a significant growth over the last decade. An increased demand in urban and semi-urban areas, and a relatively low cost of ownership are some of the leading factors propelling the growth of the market in India. Being the preferred alternative to public transports and four-wheelers also adds to its popularity. Lately, the industry has been facing headwinds and is showing signs of weakness with rising fuel prices, growing safety issues, multiple road accidents, higher insurance charges and uncertainty regarding the electrification of bikes. These are the reasons impeding the industry's growth. The two-wheeler market in India is forecasted to expand at a CAGR of 7.33%, and reach a sales volume of 24.89 Mn units by 2024, from 21.19 Mn in 2019.

MARKET SEGMENTATION ANALYSIS

The two-wheeler market in India is segmented on the basis of scooters, motorcycles, and mopeds. The motorcycle segment occupies two-third market share of the two-wheeler market in India, and is followed by the scooters and mopeds segments. The market share of the motorcycles segment increased by 5% year-on-year during the FY 2018-FY 2019 period, while that of the scooters segment decreased marginally during the same period. In 2018, the top products in the Motorcycles segment were Hero Splendor, Hero HF Deluxe, Honda CB Shine, Bajaj CT100, and Hero Passion, while for

the Scooters segment Honda Activa, TVS Jupiter, Suzuki Access, Honda Dio, and Hero Maestro were the major products.

GOVERNMENT INITIATIVES:

With the introduction of the government-backed program, Amma Bikes Scheme, which entitles every working woman in Tamil Nadu for a subsidy of 50% up to INR 25,000 on the purchase of a two-wheeler, the sale of two-wheelers in the state has gone up. However, the conversion of conventional bikes (up to 150 cc) into electric ones had an adverse impact on top players in the two-wheeler market. Two-wheelers, with a capacity of up to 150 cc, account for approximately 88% of the overall two-wheelers production in India. The target to electrify all these two-wheelers produced by 2025 is a major challenge for giant companies as more than 90% of their businesses are constituted of such bikes. Therefore, the transition will lead to a substantial monetary loss for the companies.

COMPETITION ANALYSIS

In FY 2019, Hero MotoCorp Limited (formerly Hero Honda Limited) maintained its leadership position in the Indian two-wheeler market, followed by Honda Motorcycle and Scooter India Private Limited. TVS Motor Company Limited and Bajaj Auto Limited maintained the third and fourth positions, respectively. Other significant players in the sector include Eicher Motors Limited, India Yamaha Motor Private Limited, and Suzuki Motorcycle India Private Limited. All major players are currently going through a transitional phase to launch electric bikes because of the recent Niti Aayog directive.

Companies Covered

Bajaj Auto Limited

Eicher Motors Limited

Hero MotoCorp Limited

TVS Motor Company Limited

Mahindra Two-wheelers Limited

Honda Motorcycle and Scooter India, Private Limited

India Kawasaki Motors Private Limited

India Yamaha Motor Private Limited

Piaggio Vehicles Private Limited

Suzuki Motorcycle India Private Limited

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Note: Similar information covered for all other public companies. Private companies' data given on best effort basis.

- 9.4. Eicher Motors Limited
- 9.5. Hero MotoCorp Limited
- 9.6. TVS Motor Company Limited
- 9.7. Mahindra Two Wheelers Limited
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