



2-Wh Business (Domestic)

S. Sridhar
CEO – 2Wh

1st August 2009





Agenda

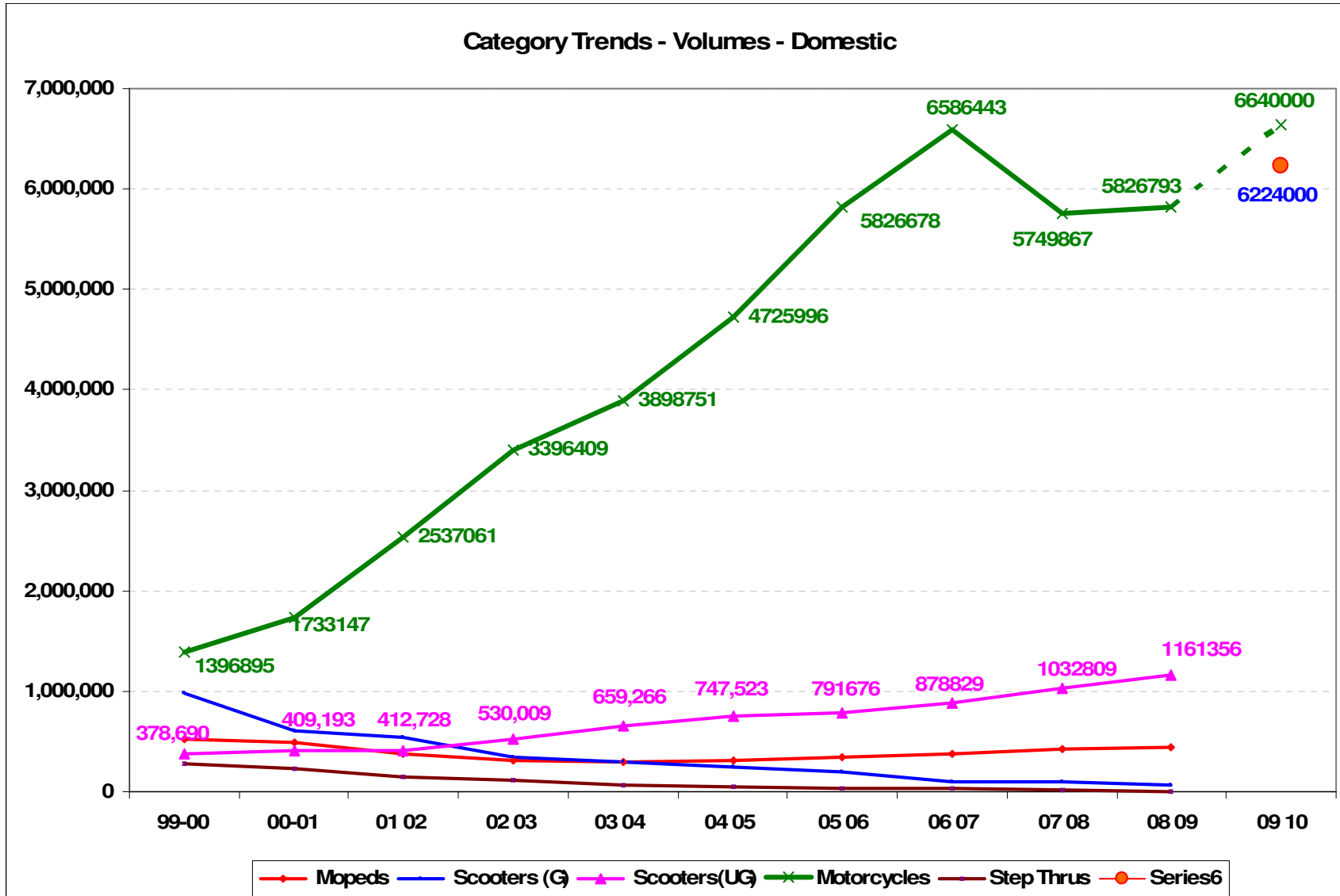
- Industry Trend
- Industry Insights
- Segment Trends
- BAL Performance



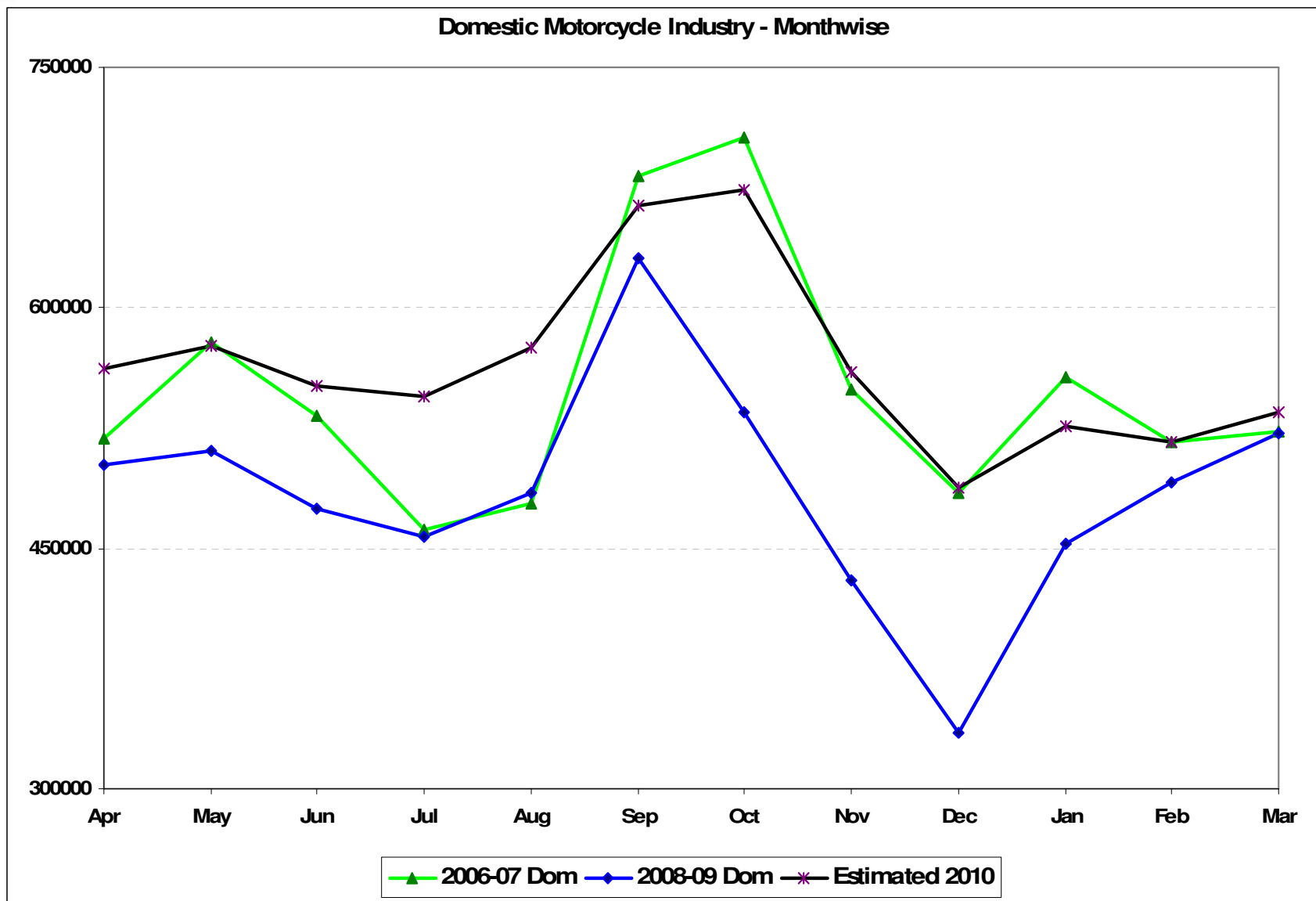
Industry Trend



Industry Trend



Motorcycle Industry – Month wise Forecast





Industry Insights

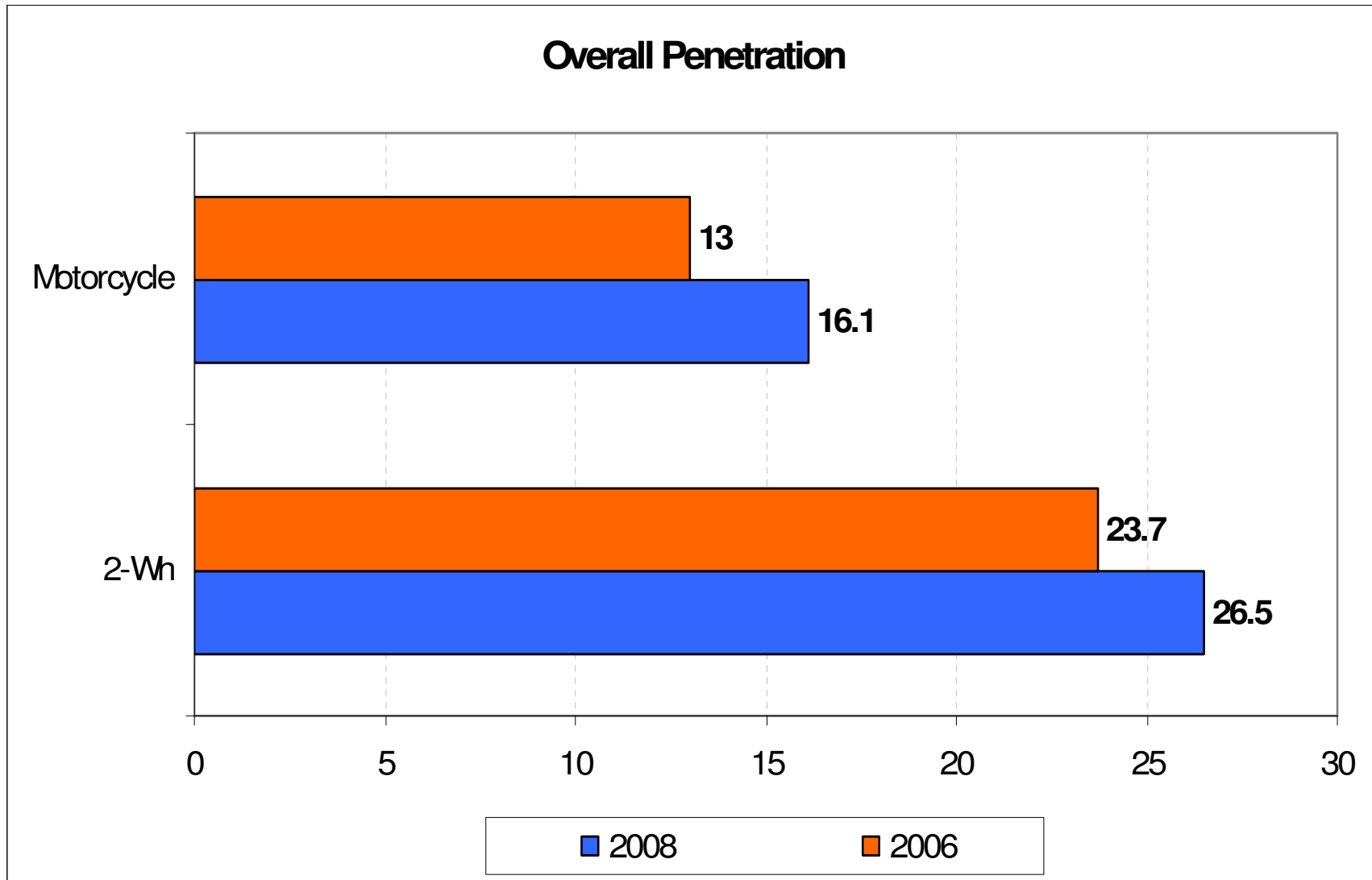




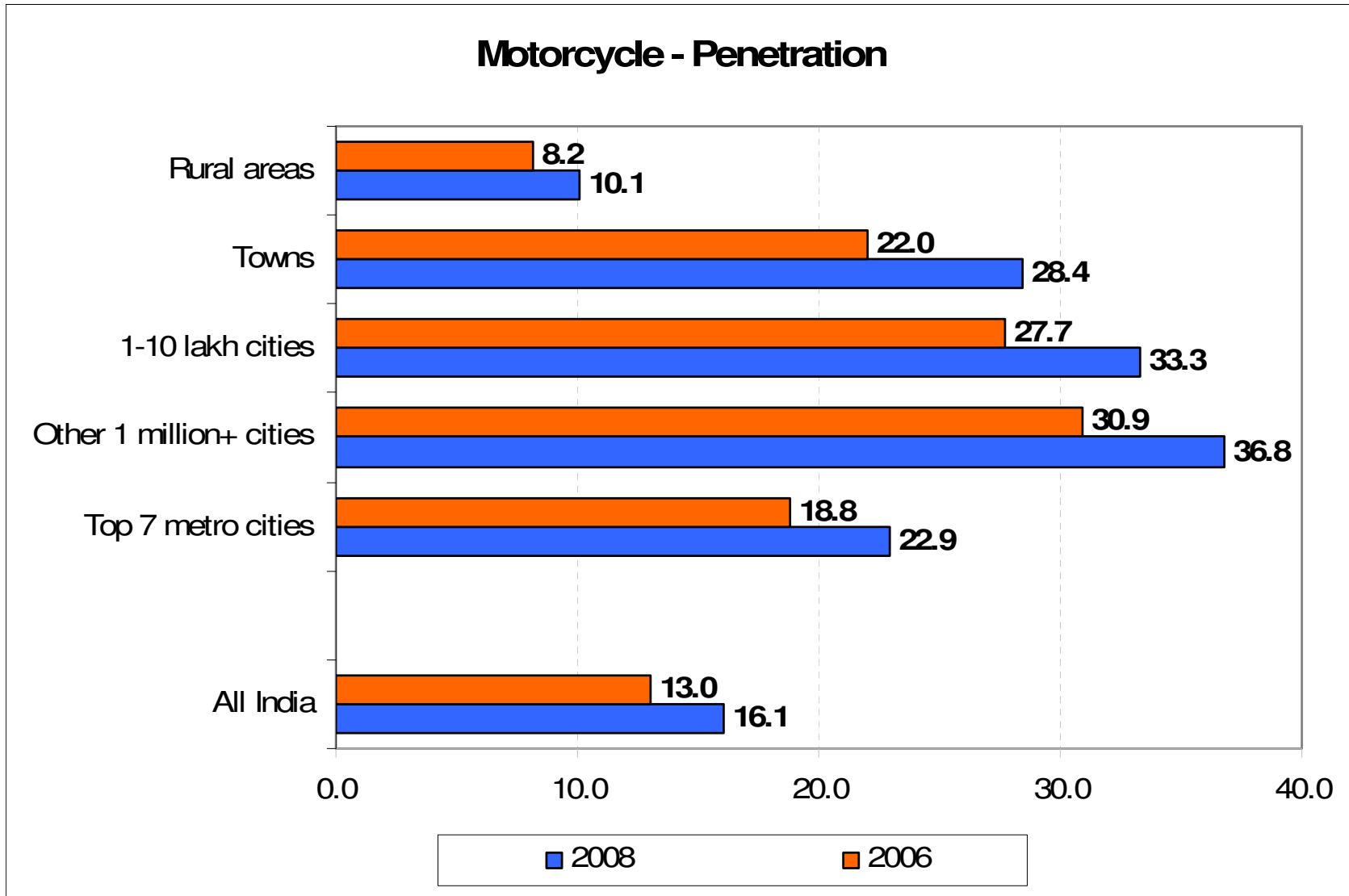
Industry Insights

- Vehicle Penetration
- Population Strata
- Age
- Occupation
- Household Income
- Repeat Vs First Time

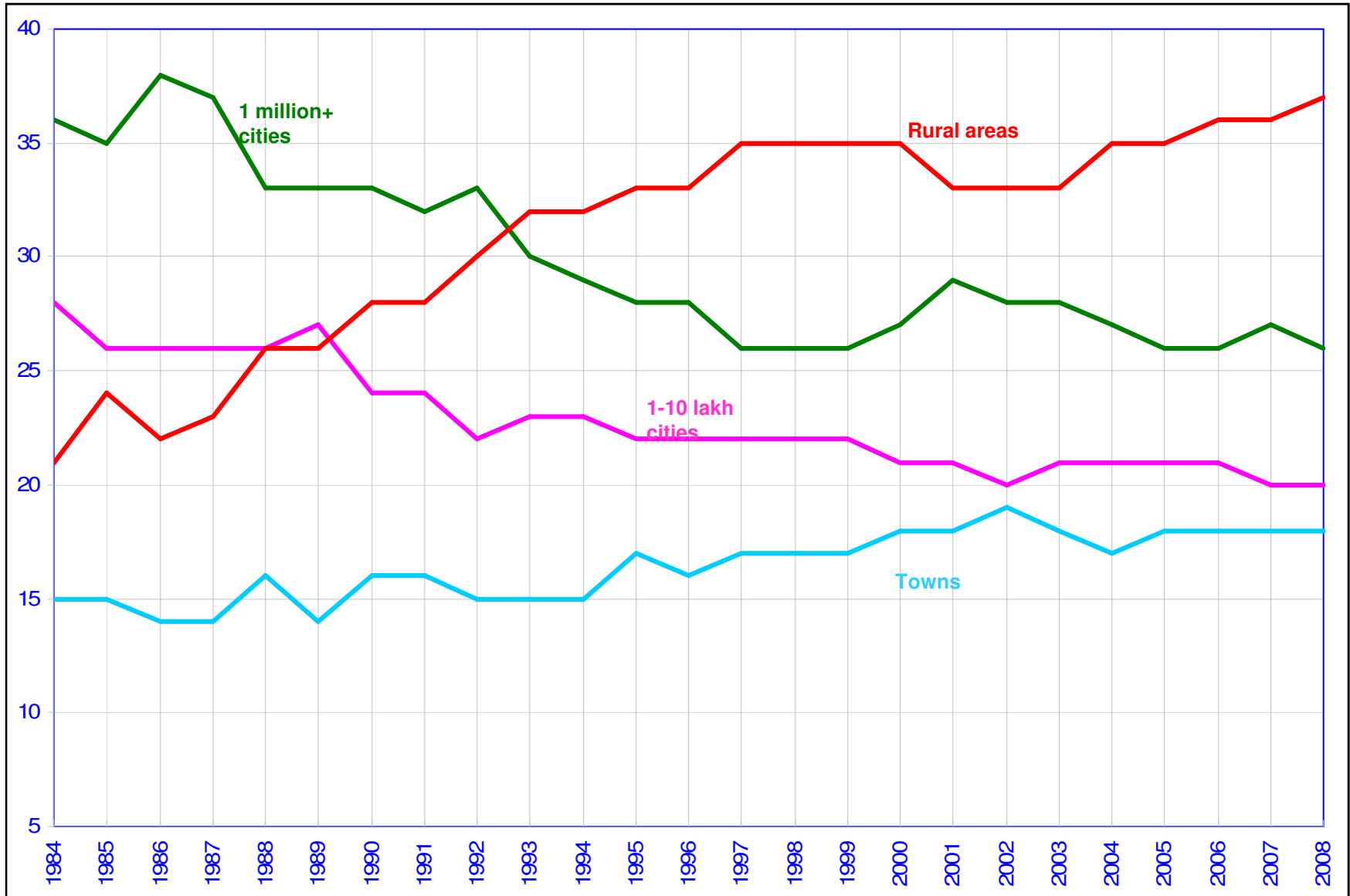
All India Penetration



Penetration – Motorcycles – (Population Strata)



% Contribution By Population Strata



BAL: Metro Vs. Rural M/C

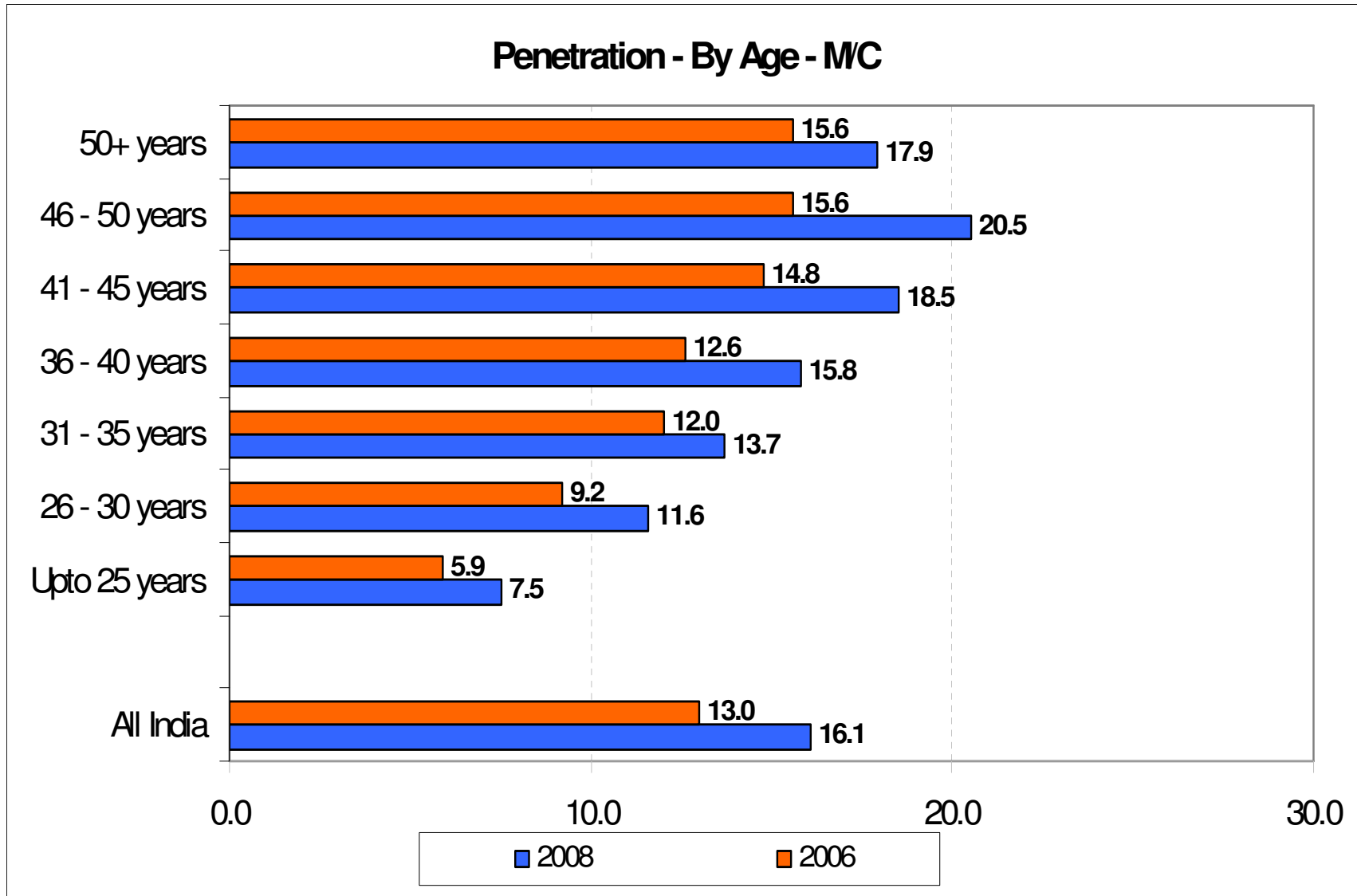
Metro Vs. Rural MS%	2008 MS%
Metro Cities	31%
Rural	22%
Difference	9%



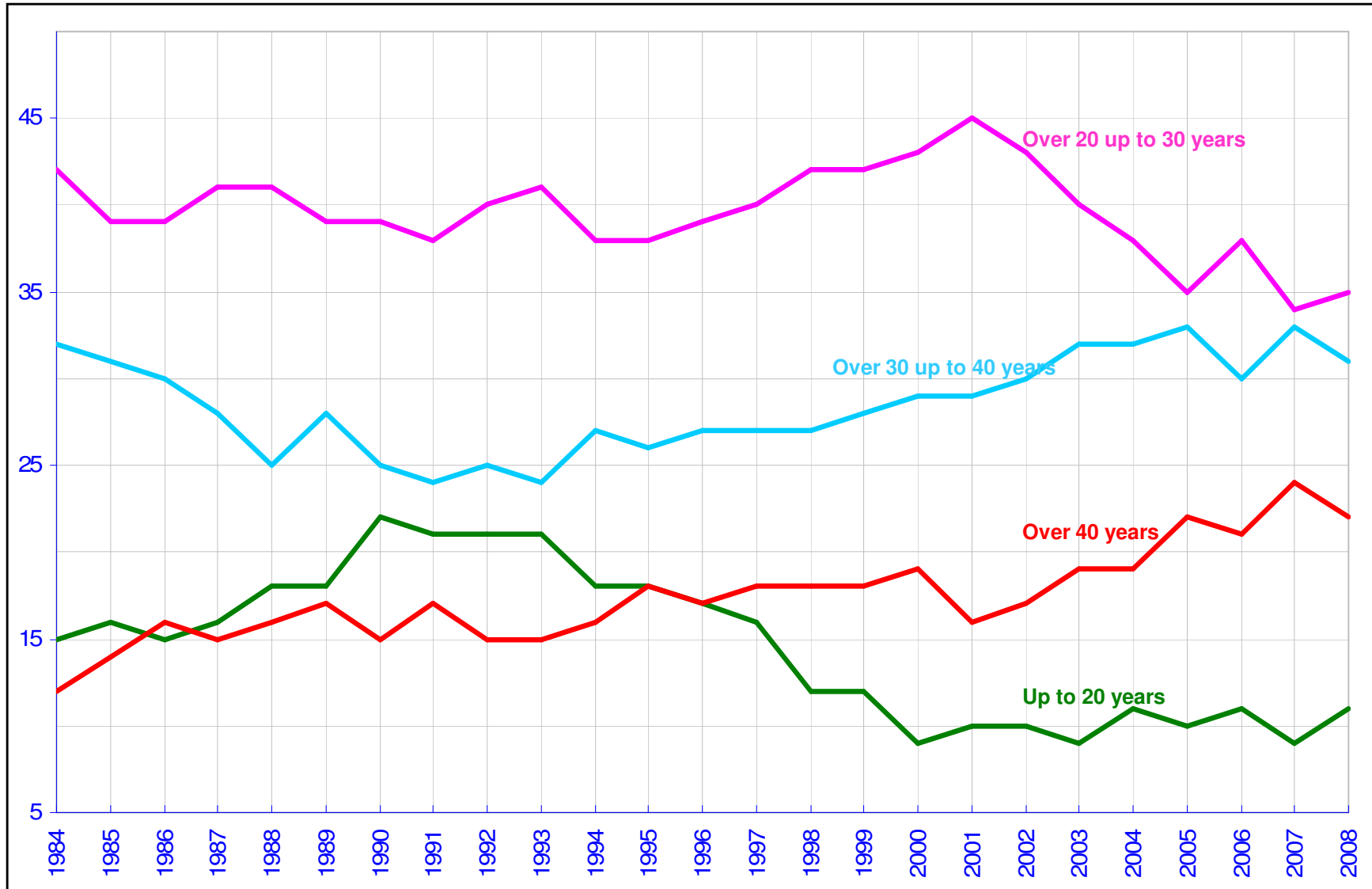
Discussion Rural Vs. Urban : BAL Strategy



Penetration by Age



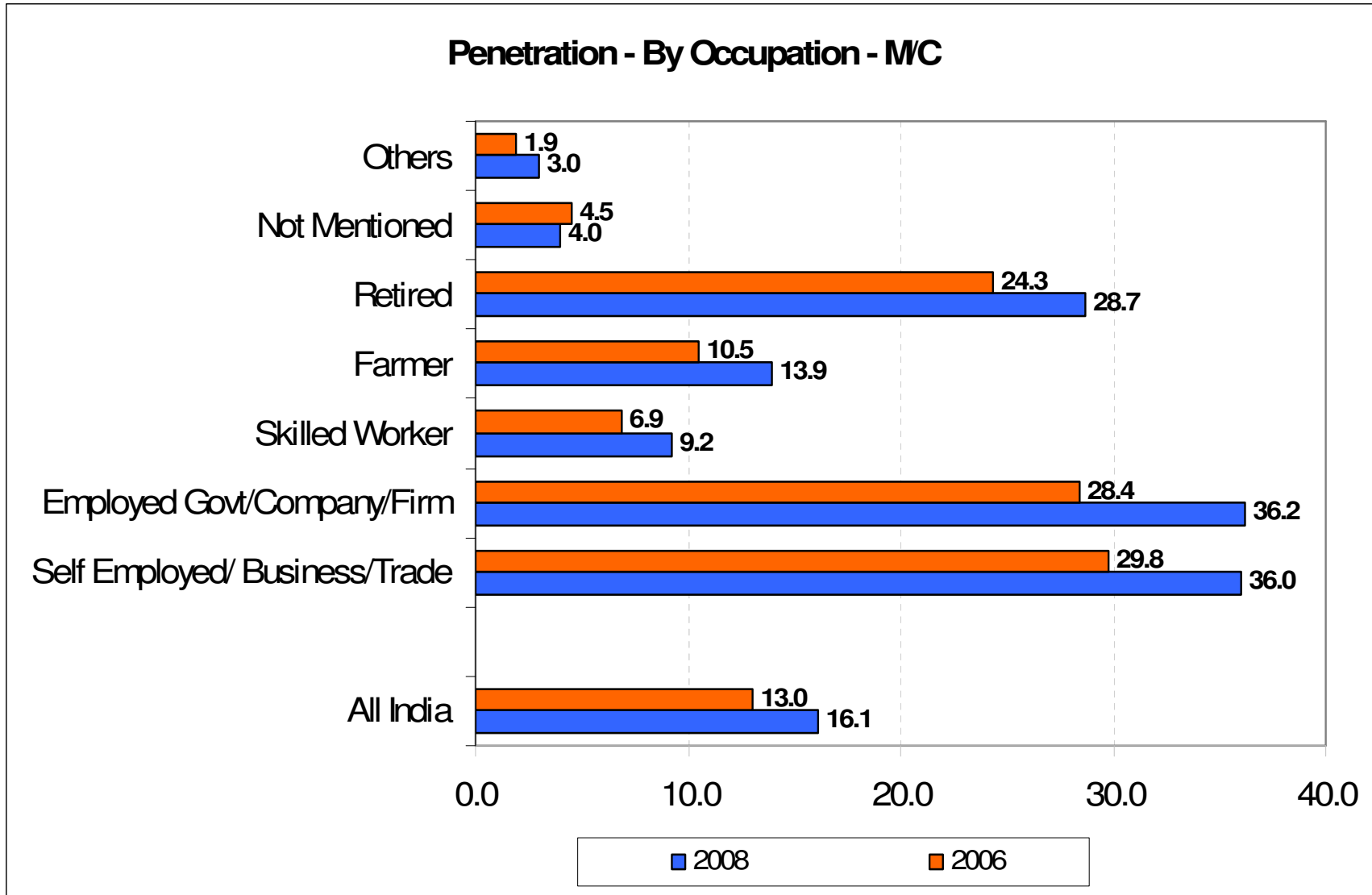
Contribution By age



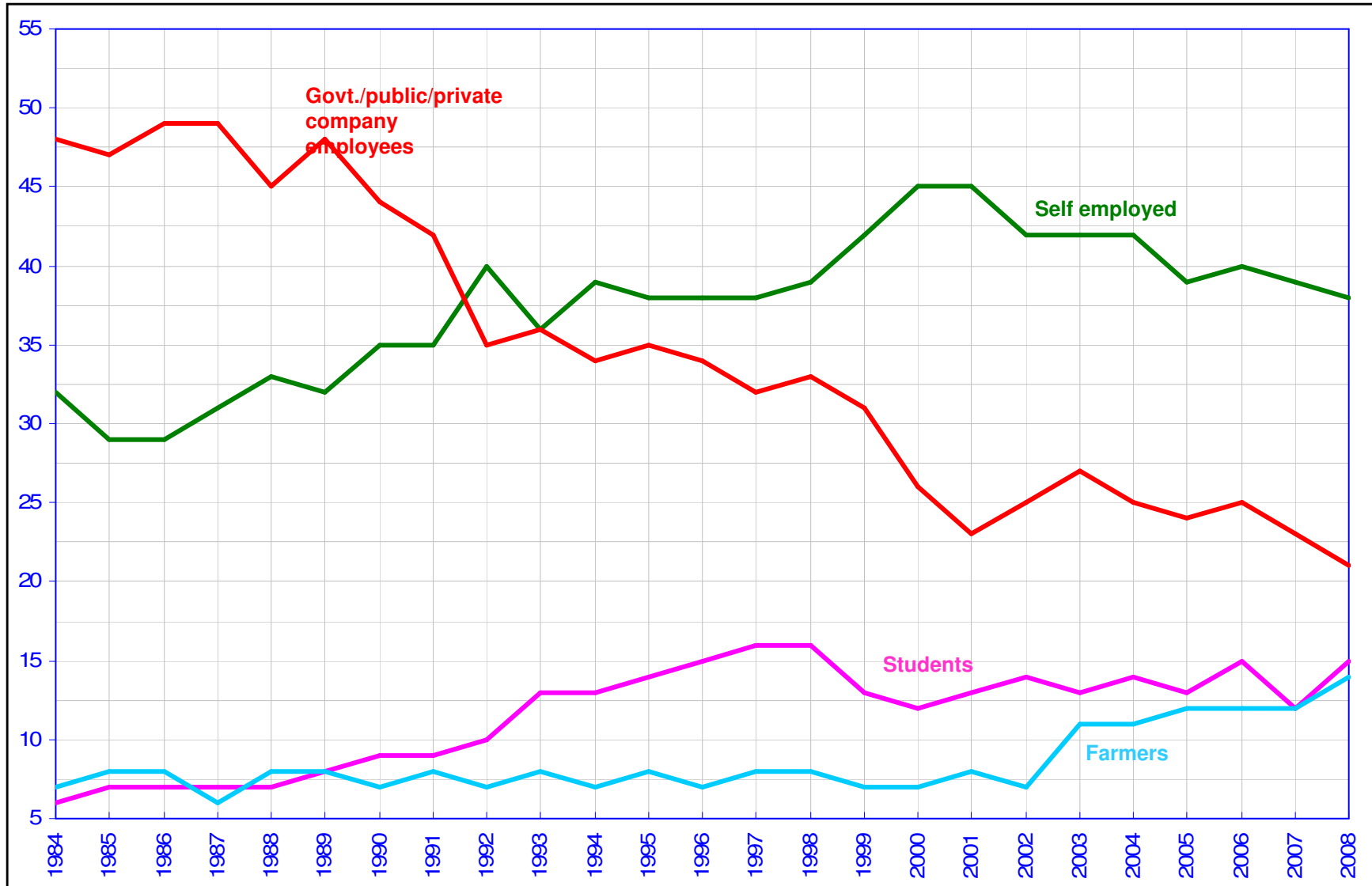
BAL: Below 20 Vs. Above 40 – M/C

	2008 MS%
Below 20	35%
Above 40	24%
Difference	11%

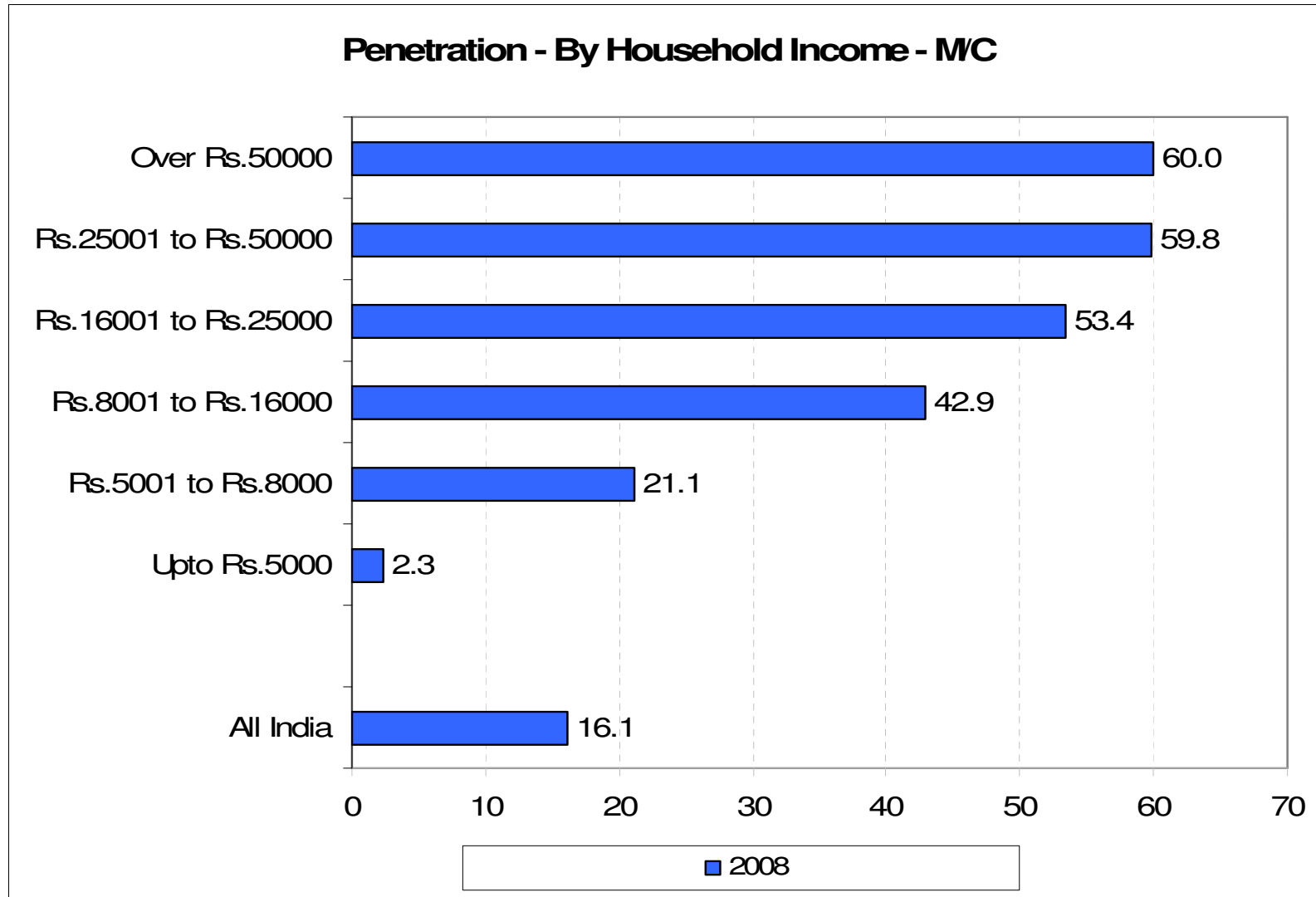
Penetration by Occupation



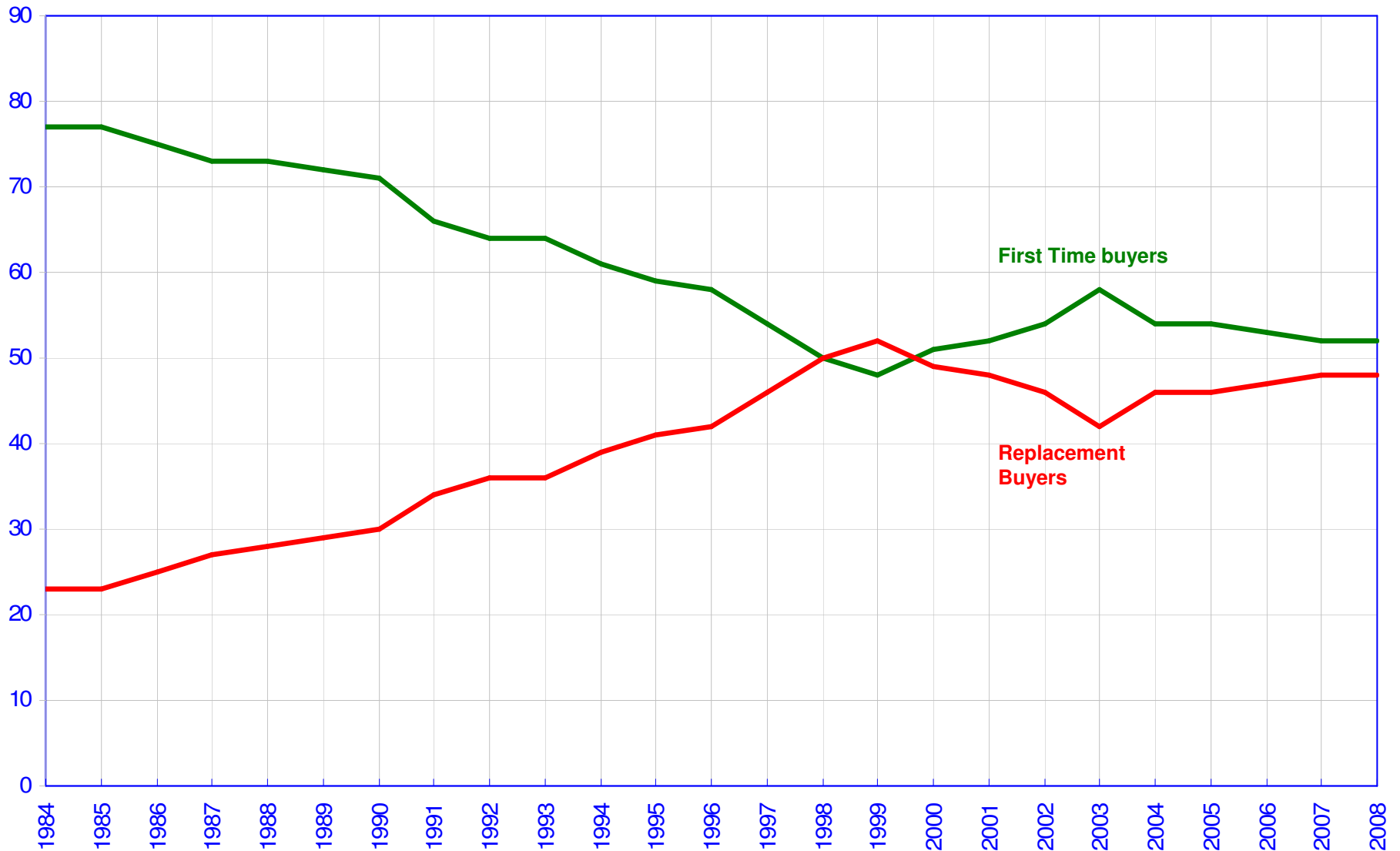
Contribution by Occupation



Penetration By Income



Repeat Vs. New Buyer



Segment Analysis

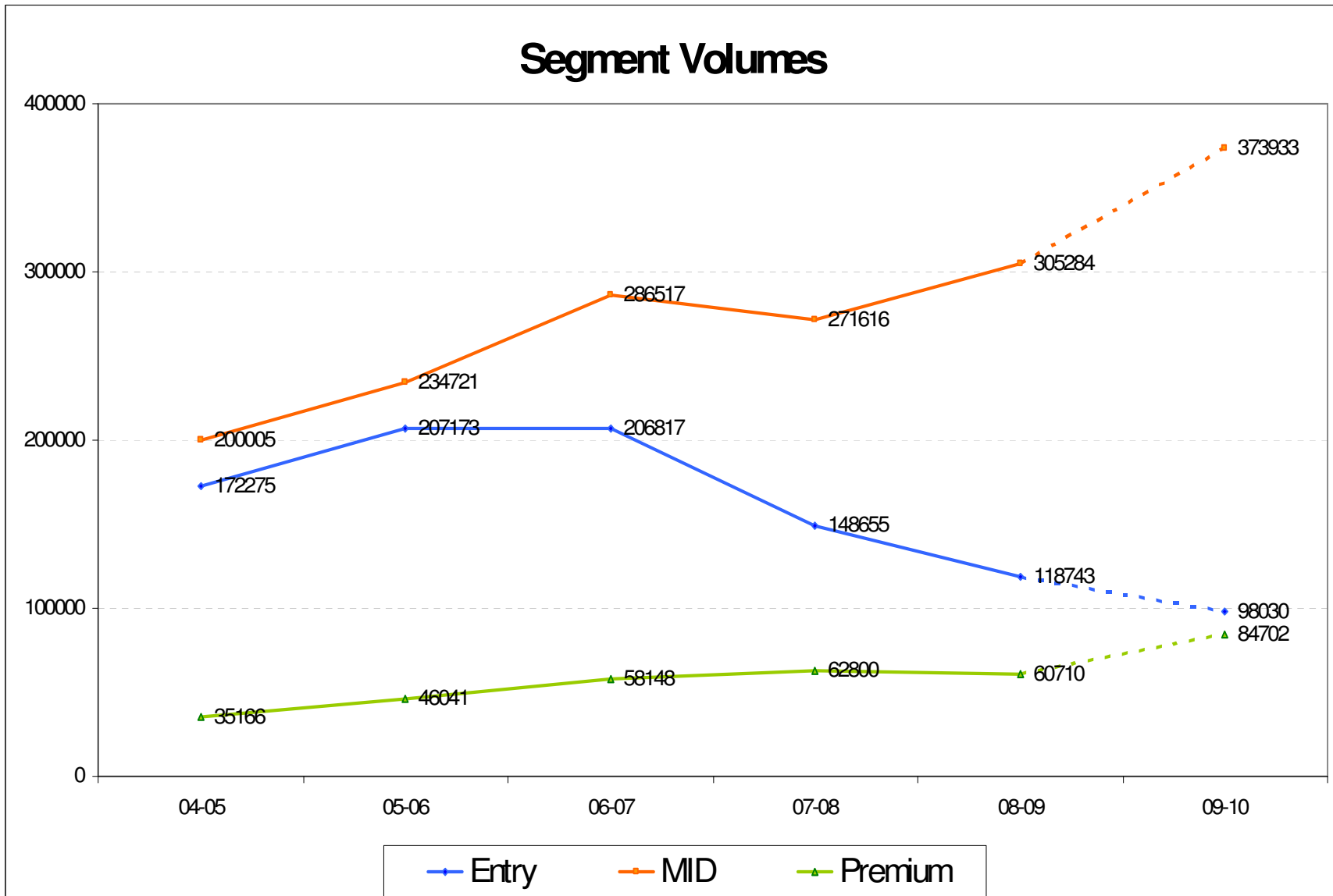




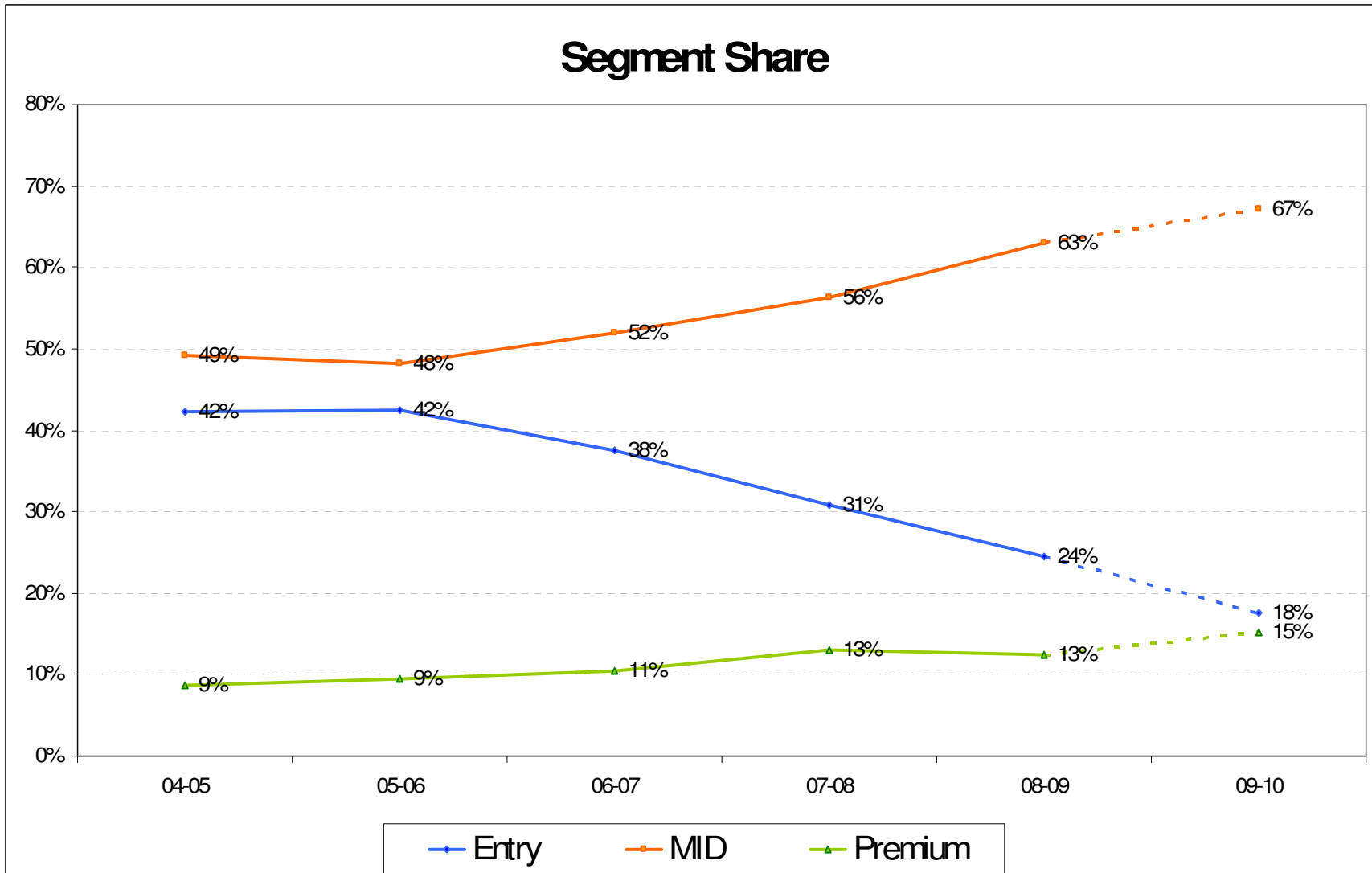
Motorcycle Segments – Major Brands

- Entry (Commuter Standard)
- Mid
 - Commuter Deluxe
 - Light Sports
- Premium (Sports)

Segment Volumes



Segment Share



Entry Segment

Platina



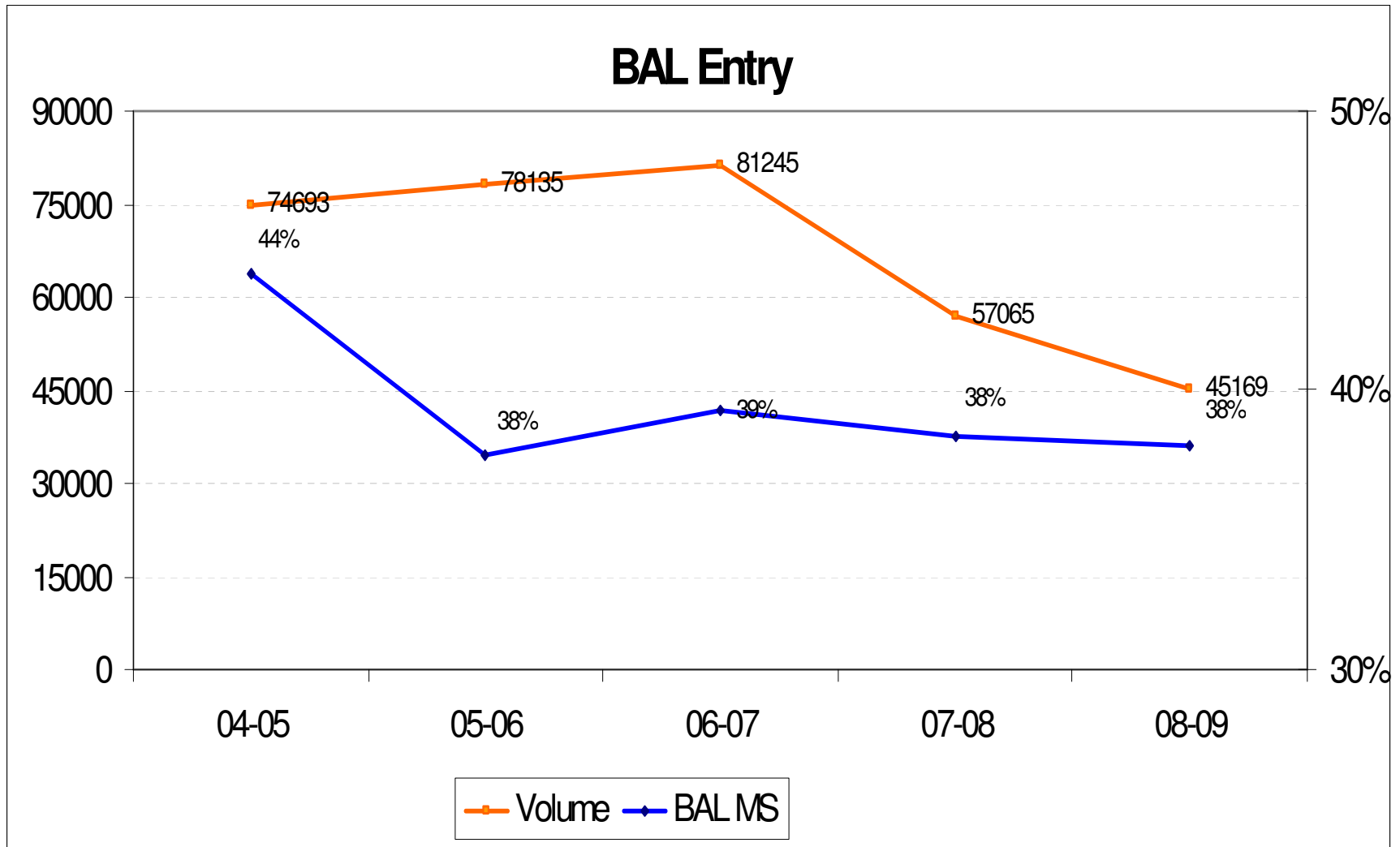
CD Deluxe



TVS Star



Entry Volume and MS%





MID Segment

XCD
135



Passion



Discover
DTS-Si



Splendor



August 3, 2009

BAJAJ AUTO - 2 Wh

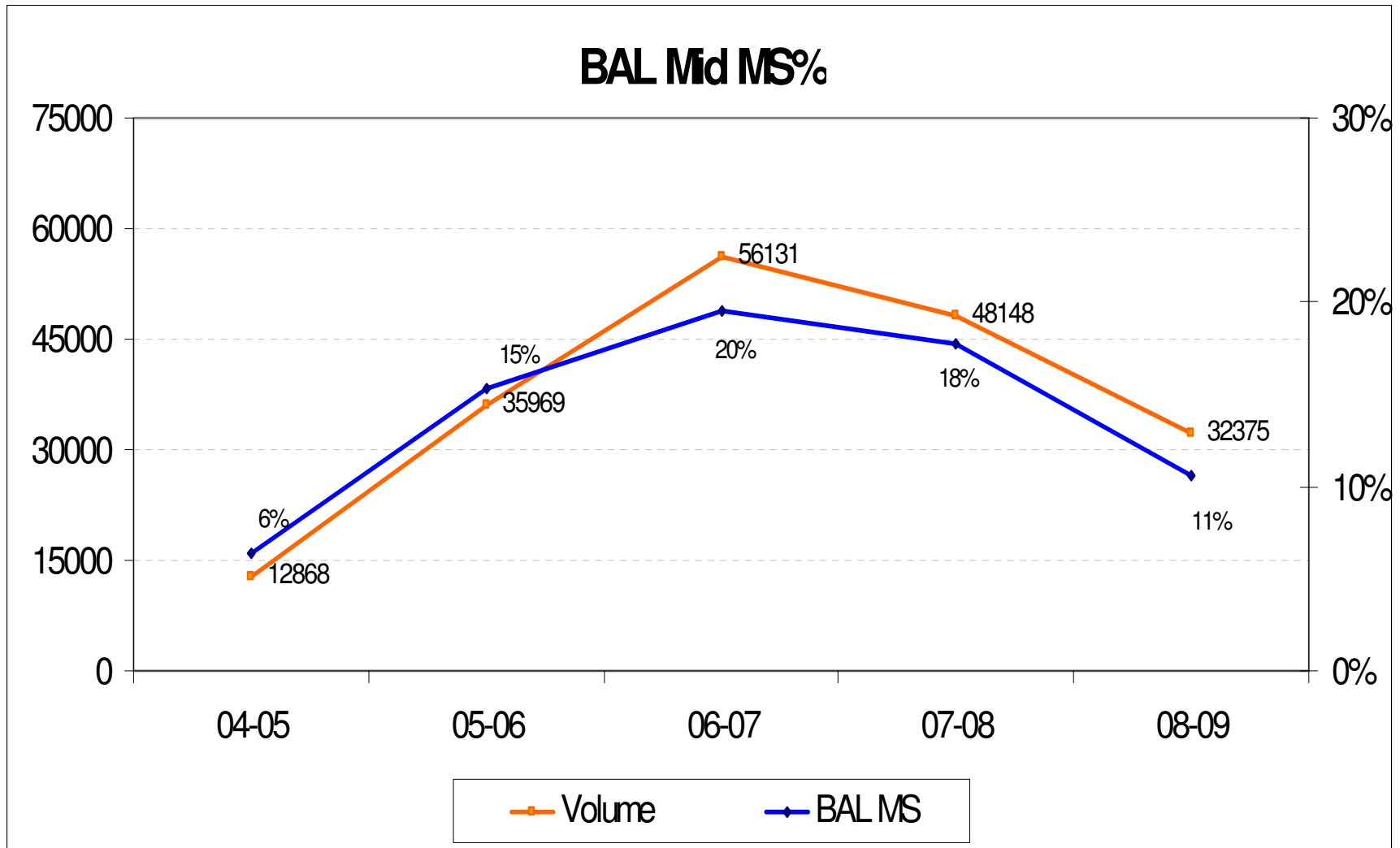
26

Discover DTS-Si



- Long distance Bike (100 Km/day)
 - Durability
 - Comfort
 - Mileage
- Discover, The Brand
- Rs. 40000 Ex-showroom

MID Volume and MS%



Premium Segment

Pulsar



FZ - S



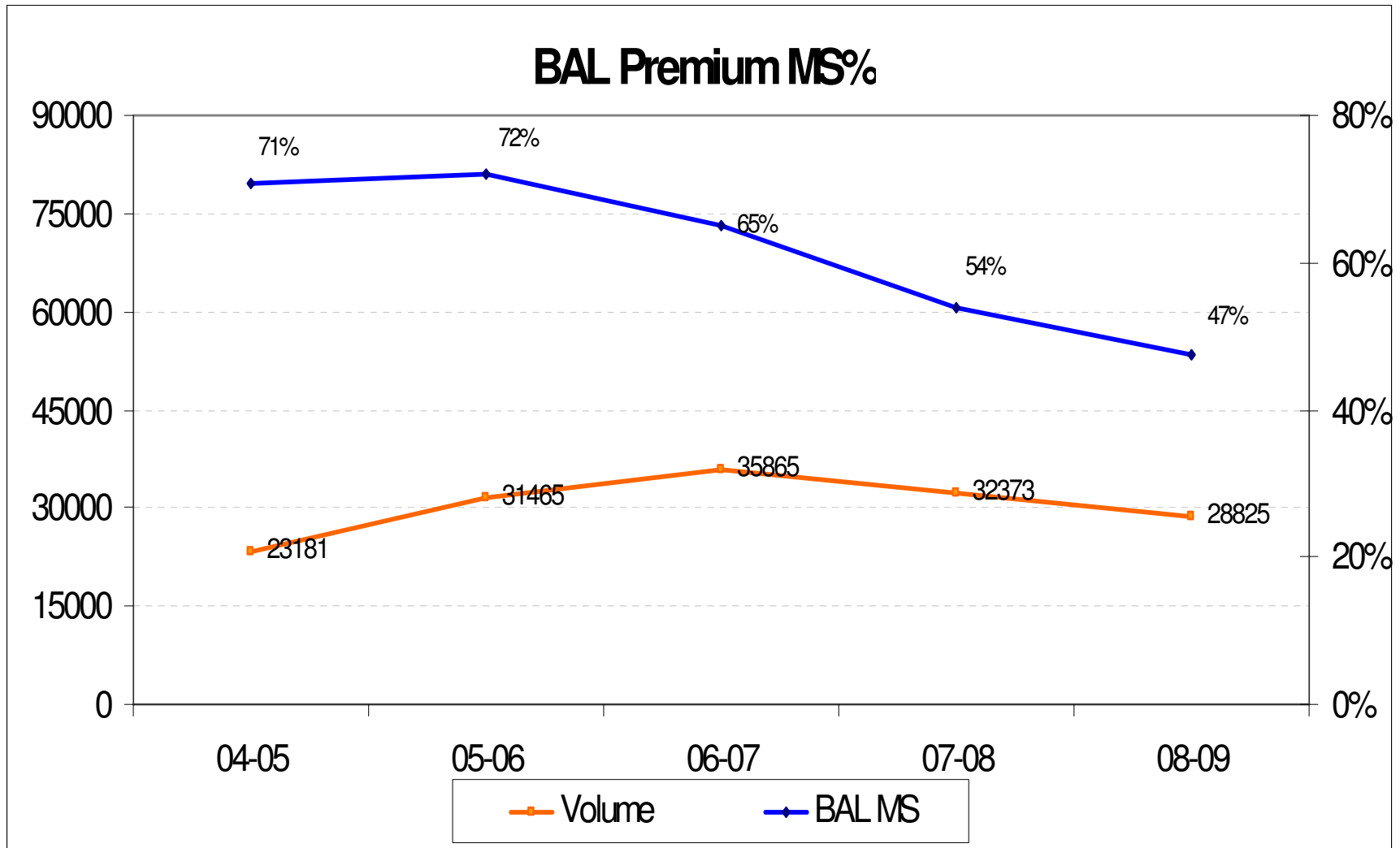
Hunk



Apache



Premium Volume and MS%

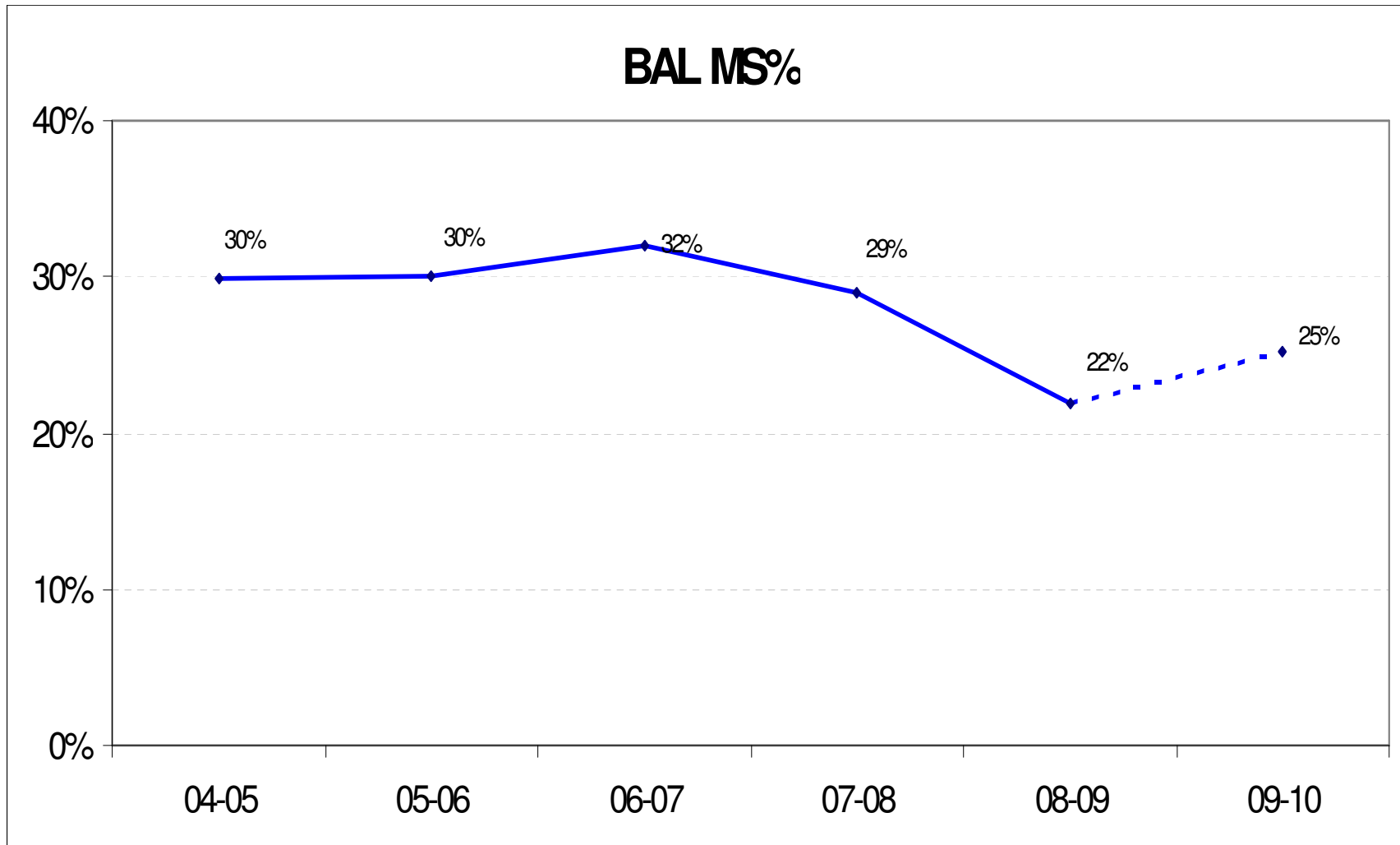


Pulsar Performance Analysis

BRAND	FY 04-05	FY 05-06	FY 06-07	FY 07-08	FY 08-09
PULSAR 150	20736	28634	30528	21965	19602
PULSAR 180	745	1324	4064	6557	6049
PULSAR 220	0	0	5	791	499
PULSAR 200	0	0	225	2700	1912
TOTAL PULSARS	21480	29958	34822	32014	28061
Share of 180 and above					
Volume of 180 cc +	745	1324	4294	10049	8459
Share	3.47%	4.42%	12.33%	31.39%	30.15%

Premium Industry	35166	43663	55568	59500	61541
Pulsar MS%	61%	69%	63%	54%	46%

Overall MS% Performance



Performance Summary

Scenario - 1	08-09	09-10	Growth
BAL Volume	106369	140633	32.2%
Industry	485568	556665	14.6%
MS%	21.9%	25.3%	
Scenario - 2	08-09	09-10	Growth
BAL Volume	106369	130000	22.2%
Industry	485568	519558	7.0%
MS%	21.9%	25.0%	



Thank You

