

# 2010 Data Capture

## Media Release



# Summary

This report contains aggregated dollar (Canadian wholesale) and unit sales figures from bicycle suppliers to the Independent Bicycle Dealer (IBD) channel. It is estimated that the reporting suppliers account for approximately 95% of the channel.

This report includes data from a number of suppliers who have not reported in previous years. Therefore, direct comparisons of Unit and \$ Sales figures from previous years are not possible. Instead, comparisons of proportional sales figures for each category have been calculated (90% of suppliers for 2009 & 95% for 2010).

This report also includes Electric and 29" wheel category bikes, which were not captured prior to 2010, so comparisons to previous years are not possible.

The majority of this report consists of category-by-category breakdowns of Units and Dollar sales figures, on a month-by-month and quarterly basis for the fourth quarter (October to December) of 2010, plus a summary of the full year. Figures for the corresponding period of 2009 are provided for comparison.

Comparative figures are provided for the U.S. market, drawn from U.S. reporting organizations.

It should be noted that all Dollar figures are at wholesale, unless otherwise stated.

For more information, please contact [news@btac.org](mailto:news@btac.org).

# Analysis

- The fourth Quarter of 2010 saw a reversal to the decline in the previous two quarters. All categories with the exception of 26" saw growth Year-Over-Year (YOY), led by Road and Hybrid. For the full twelve month period, Unit sales are up 3% (YOY) and Dollar sales are flat (down 0.34%).
- Overall, IBD suppliers shipped 328, 984 units for 2010, up 3% from the previous year. Road and Hybrid combined have overtaken 26" as the largest category, after 26" fell from 52.53% of Dollar sales to 44.44%. On an annual basis, Road was the strong performer, up 17.2% in Units and 21.13% in Dollars, to counter the decline in the 26" category.
- In the fourth Quarter, Average Unit Prices (AUP) continued the decline that began in Q3, however, the rate of decline slowed substantially. On an annual basis, earlier Quarters left the AUP down across all categories except Road (up 3.35%). The decline in AUP can likely be traced in large part to the drastic shrinking in inventory levels, as suppliers continued to clean up their previously high inventory positions.
- On an annual basis, we have estimated the IBD sector of the bicycle market to have grown to 357,591 units in 2010, up from 336,23 in 2009. The estimated retail dollar sales value of the IBD sector has increased to \$251 million from \$244 million, Year-Over-Year.
- In comparison to the U.S. IBD sector, proportional Unit sales are virtually identical in the 26" category, higher in Canada for Youth and Hybrid categories and lower for Road. Overall, the Canadian Unit sales market is approximately 12.5% the size of the American market and 16.1% for Dollar sales, making the Canadian IBD market proportionately larger than the U.S. one. In Dollar sales, the Canadian 26" category makes up a substantially larger proportion than the U.S. market, and the reverse is true for the Road category. Canadian Average Unit prices are higher than American ones across every category, often by a substantial margin.

## January-December 2009/2010 Sales by Units

	January - December, 2009	January - December, 2009	January - December, 2010	January - December, 2010	January - December, 2009-2010	January - December, 2009-2010
	Sales Units	% of Total Units	Sales Units	% of Total Units	% Change - Units	Proportional % Change
<b>26" Bikes</b>						
26" Cruiser	5033	1.66	5446	1.66	8.21	2.51
26" Comfort (All)	12019	3.97	10999	3.34	-8.49	-13.30
26" Rigid MTB	1594	0.53	3286	1.00	106.15	95.30
26" Front S MTB	92111	30.44	79467	24.16	-13.73	-18.27
26" Dual S MTB	19641	6.49	20310	6.17	3.41	-2.04
<b>Total 26" Bikes</b>	<b>130398</b>	<b>43.09</b>	<b>119508</b>	<b>36.33</b>	<b>-8.35</b>	<b>-13.17</b>
<b>Youth Bikes</b>						
20"/24" BMX/Freestyle	14247	4.71	14229	4.33	-0.13	-5.38
24" Juvenile	13647	4.51	16495	5.01	20.87	14.51
20" Juvenile	15629	5.16	19343	5.88	23.76	17.25
19" and Below	17967	5.94	28787	8.75	60.22	51.79
<b>Total Youth Bikes</b>	<b>61490</b>	<b>20.32</b>	<b>78854</b>	<b>23.97</b>	<b>28.24</b>	<b>21.49</b>
Road Bikes	36089	11.93	44647	13.57	23.71	17.20
Hybrid Bikes	71250	23.55	79334	24.11	11.35	5.49
Tandems	227	0.08	257	0.08	13.22	7.26
E-bikes	-	-	545	0.17	-	-
29" Wheel	-	-	2910	0.88	-	-
Miscellaneous	3146	1.04	2929	0.89	-6.90	-11.80
<b>Total All Bikes</b>	<b>302600</b>	<b>100.00</b>	<b>328984</b>	<b>100.00</b>	<b>8.72</b>	<b>3.00</b>

# January-December 2010 Sales by Units Canada vs U.S.A.

	Canada	Canada	USA	USA
	January - December, 2010			
	Sales Units	% of Total Units	Sales Units	% of Total Units
<b>26" Bikes</b>				
26" Cruiser	5446	1.66	86455	3.30
26" Comfort (All)	10999	3.34	234183	8.80
26" Rigid MTB	3286	1.00	4154	0.20
26" Front S MTB	79467	24.16	567571	21.40
26" Dual S MTB	20310	6.17	69877	2.60
<b>Total 26" Bikes</b>	<b>119508</b>	<b>36.33</b>	<b>962240</b>	<b>36.30</b>
<b>Youth Bikes</b>				
20"/24" BMX/Freestyle	14229	4.33	156036	5.90
24" Juvenile	16495	5.01	107687	4.10
20" Juvenile	19343	5.88	162834	6.10
19" and Below	28787	8.75	133877	5.00
<b>Total Youth Bikes</b>	<b>78854</b>	<b>23.97</b>	<b>560434</b>	<b>21.10</b>
Road Bikes	44647	13.57	453431	17.10
Hybrid Bikes	79334	24.11	573695	21.60
Tandems	257	0.08	2680	0.10
E-bikes	545	0.17	-	-
29" Wheel	2910	0.88	74402	2.80
Miscellaneous	2929	0.89	24980	0.90
<b>Total All Bikes</b>	<b>328984</b>	<b>100.00</b>	<b>2651862</b>	<b>100.00</b>

Note: USA data from BPSA published figures

# January - December 2009/2010 Sales Dollars

	January - December, 2009	January - December, 2009	January - December, 2010	January - December, 2010	January - December, 2009-2010	January - December, 2009-2010
	Sales Dollars	% of Total \$	Sales Dollars	% of Total \$	% Change - Dollars	Proportional % Change
<b>26" Bikes</b>						
26" Cruiser	\$1,335,892.00	0.85	\$1,393,108.00	0.84	4.28	-1.21
26" Comfort (All)	\$3,640,457.00	2.32	\$3,045,701.00	1.85	-16.34	-20.74
26" Rigid MTB	\$564,002.00	0.36	\$1,158,348.00	0.70	105.38	94.57
26" Front S MTB	\$42,844,464.00	27.32	\$35,340,730.00	21.42	-17.51	-21.86
26" Dual S MTB	\$33,992,784.00	21.68	\$32,378,082.00	19.63	-4.75	-9.76
<b>Total 26" Bikes</b>	<b>\$82,377,601.00</b>	<b>52.53</b>	<b>\$73,315,970.00</b>	<b>44.44</b>	<b>-11.00</b>	<b>-15.68</b>
<b>Youth Bikes</b>						
20"/24" BMX/Freestyle	\$3,467,813.00	2.21	\$3,421,004.00	2.07	-1.35	-6.54
24" Juvenile	\$2,828,901.00	1.80	\$3,340,429.00	2.02	18.08	11.87
20" Juvenile	\$2,339,529.00	1.49	\$2,822,893.00	1.71	20.66	14.31
19" and Below	\$1,740,930.00	1.11	\$2,528,492.00	1.53	45.24	37.59
<b>Total Youth Bikes</b>	<b>\$10,377,172.00</b>	<b>6.62</b>	<b>\$12,112,819.00</b>	<b>7.34</b>	<b>16.73</b>	<b>10.58</b>
Road Bikes	\$36,807,640.00	23.47	\$47,060,307.00	28.52	27.85	21.13
Hybrid Bikes	\$25,781,092.00	16.44	\$27,441,071.00	16.63	6.44	0.84
Tandems	\$119,167.00	0.08	\$262,625.00	0.16	120.38	108.78
E-bikes	-	-	\$632,299.00	0.38	-	-
29" Wheel	-	-	\$3,109,574.00	1.88	-	-
Miscellaneous	\$1,362,908.00	0.87	\$1,046,876.00	0.63	-23.19	-27.23
<b>Total All Bikes</b>	<b>\$156,825,580.00</b>	<b>100.00</b>	<b>\$164,981,540.00</b>	<b>100.00</b>	<b>5.20</b>	<b>-0.34</b>

# January – December 2010 Sales Dollars Canada vs U.S.A.

	Canada	Canada	USA	USA
	January - December, 2010	January - December, 2010	January - December, 2010	January - December, 2010
	Sales Dollars	% of Total \$	Sales Dollars	% of Total \$
<b>26" Bikes</b>				
26" Cruiser	\$1,393,108.00	0.84	\$16,241,485.00	1.60
26" Comfort (All)	\$3,045,701.00	1.85	\$47,430,216.00	4.60
26" Rigid MTB	\$1,158,348.00	0.70	\$1,167,247.00	0.10
26" Front S MTB	\$35,340,730.00	21.42	\$159,729,335.00	15.60
26" Dual S MTB	\$32,378,082.00	19.63	\$95,989,401.00	9.40
<b>Total 26" Bikes</b>	<b>\$73,315,970.00</b>	<b>44.44</b>	<b>\$320,557,684.00</b>	<b>31.20</b>
<b>Youth Bikes</b>				
20"/24" BMX/Freestyle	\$3,421,004.00	2.07	\$27,964,201.00	2.70
24" Juvenile	\$3,340,429.00	2.02	\$18,355,537.00	1.80
20" Juvenile	\$2,822,893.00	1.71	\$19,996,819.00	1.90
19" and Below	\$2,528,492.00	1.53	\$13,067,823.00	1.30
<b>Total Youth Bikes</b>	<b>\$12,112,819.00</b>	<b>7.34</b>	<b>\$79,384,380.00</b>	<b>7.70</b>
Road Bikes	\$47,060,307.00	28.52	\$388,180,417.00	37.80
Hybrid Bikes	\$27,441,071.00	16.63	\$159,217,035.00	15.50
Tandems	\$262,625.00	0.16	\$2,215,206.00	0.20
E-bikes	\$632,299.00	0.38	-	-
29" Wheel	\$3,109,574.00	1.88	\$68,161,138.00	6.60
Miscellaneous	\$1,046,876.00	0.63	\$8,713,580.00	0.80
<b>Total All Bikes</b>	<b>\$164,981,540.00</b>	<b>100.00</b>	<b>\$1,026,429,440.00</b>	<b>100.00</b>

Note: USA data from BPSA published figures

# January – December 2010 Average Unit Price Canada vs U.S.A.

	<b>Canada</b>		<b>USA</b>
	<b>January - December, 2010</b>		<b>January - December, 2010</b>
	<b>Average Unit Price</b>		<b>Average Unit Price</b>
<b>26" Bikes</b>			
26" Cruiser	\$255.80		\$187.86
26" Comfort (All)	\$276.91		\$202.53
26" Rigid MTB	\$352.51		\$280.99
26" Front S MTB	\$444.72		\$281.43
26" Dual S MTB	\$1,594.19		\$1,373.69
<b>Total 26" Bikes</b>	<b>\$613.48</b>		<b>\$333.14</b>
<b>Youth Bikes</b>			
20"/24" BMX/Freestyle	\$240.42		\$179.22
24" Juvenile	\$202.51		\$170.45
20" Juvenile	\$145.94		\$122.80
19" and Below	\$87.83		\$97.61
<b>Total Youth Bikes</b>	<b>\$153.61</b>		<b>\$141.65</b>
Road Bikes	\$1,054.05		\$856.10
Hybrid Bikes	\$345.89		\$277.53
Tandems	\$1,021.89		\$826.57
E-bikes	\$1,160.18		-
29" Wheel	\$1,068.58		\$916.12
Miscellaneous	\$357.42		\$348.82
<b>Total All Bikes</b>	<b>\$501.49</b>		<b>\$387.06</b>

Note: USA data from BPSA published figures

# Estimated Size of Market - Annual

	January - December, 2010					
	Sales Units	Estimated IBD Mkt Size*	Sales Dollars	Estimated IBD Mkt Size*	Estimated IBD Mkt Size**	Estimated Average Retail Price
		Unit Sales		Dollar Sales - Wholesale	Dollar Sales - Retail	
<b>26" Bikes</b>						
26" Cruiser	5446	5920	\$1,393,108.00	\$1,514,248.00	\$2,119,947.00	\$358.13
26" Comfort (All)	10999	11955	\$3,045,701.00	\$3,310,545.00	\$4,634,763.00	\$387.67
26" Rigid MTB	3286	3572	\$1,158,348.00	\$1,259,074.00	\$1,762,704.00	\$493.51
26" Front S MTB	79467	86377	\$35,340,730.00	\$38,413,837.00	\$53,779,372.00	\$622.61
26" Dual S MTB	20310	22076	\$32,378,082.00	\$35,193,567.00	\$49,270,994.00	\$2,231.87
<b>Total 26" Bikes</b>	<b>119508</b>	<b>129900</b>	<b>\$73,315,970.00</b>	<b>\$79,691,272.00</b>	<b>\$111,567,781.00</b>	<b>\$858.87</b>
<b>Youth Bikes</b>						
20"/24" BMX/Freestyle	14229	15466	\$3,421,004.00	\$3,718,483.00	\$5,205,876.00	\$336.59
24" Juvenile	16495	17929	\$3,340,429.00	\$3,630,901.00	\$5,083,261.00	\$283.52
20" Juvenile	19343	21025	\$2,822,893.00	\$3,068,362.00	\$4,295,707.00	\$204.31
19" and Below	28787	31290	\$2,528,492.00	\$2,748,361.00	\$3,847,705.00	\$122.97
<b>Total Youth Bikes</b>	<b>78854</b>	<b>85711</b>	<b>\$12,112,819.00</b>	<b>\$13,166,108.00</b>	<b>\$18,432,551.00</b>	<b>\$215.05</b>
Road Bikes	44647	48529	\$47,060,307.00	\$51,152,508.00	\$71,613,511.00	\$1,475.67
Hybrid Bikes	79334	86233	\$27,441,071.00	\$29,827,251.00	\$41,758,151.00	\$484.25
Tandems	257	279	\$262,625.00	\$285,462.00	\$399,647.00	\$1,430.64
E-bikes	545	592	\$632,299.00	\$687,282.00	\$962,195.00	\$1,624.25
29" Wheel	2910	3163	\$3,109,574.00	\$3,379,972.00	\$4,731,961.00	\$1,496.01
Miscellaneous	2929	3184	\$1,046,876.00	\$1,137,909.00	\$1,593,073.00	\$500.38
<b>Total All Bikes</b>	<b>328984</b>	<b>357591</b>	<b>\$164,981,540.00</b>	<b>\$179,327,761.00</b>	<b>\$251,058,865.00</b>	<b>\$702.08</b>
*Based on estimated data capture rate of 95% of IBD suppliers						
** Based on average mark up rate of 40%						