

# The Sunset of Suntour

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## **SUNRISE - 1912 to 1973 - Origin of the SunTour company**

The Maeda Iron Works Company was founded by Shikanosuke Maeda in 1912 in Kawati-Nagano. Maeda made freewheels and sprockets for bicycles and agricultural machinery. Maeda was owned by the Maeda and Kawai families. A few months later, Maeda moved to Sakai. The original sprockets and freewheels were called 8.8.8.

It was a good time to start a bicycle component business. WW-I ended bicycle imports into Japan. Osaka was a center of Japan's small arms production. After WW-I, many of the Japan's newly established small arms factories started producing bicycles. Similar swords-to-plowshares transitions took place in Saint Etienne, France and Birmingham, England.

In 1931, Mr. Taizo Kumagai married Shikanosuke Maeda's daughter and changed his name to Taizo Maeda.

During WW-II, Maeda Iron Works merged with eleven other small factories. The new company was called Toa Seiki Kosakusho. Taizo Maeda was elected President. The merged company was taken over by the Japan's military government in 1943. It became a subsidiary of the Kure Military Factory and produced ammunition.

On July 10, 1945, a major B-29 raid on Osaka burned out the Maeda factory. The factory was rebuilt after VJ Day and by 1946, 58 employees were producing freewheels at prewar volumes. Twenty-five year-old Junzo Kawai joined Maeda Iron works in 1946. He moved ahead rapidly and became President when Taizo Maeda passed away in 1975.

At the end of WW-II, there were about 7 million bicycles in Japan. The Japanese bicycle industry was centered in Osaka, which had been heavily bombed. The industry slowly rebuilt after WW-II. There was a large demand for basic one-speed bicycles to provide transportation for a Japanese population that had few motor vehicles and little money for gasoline.

Japan's pre-war experience with multi-gear bicycles had been with British Sturmey Archer and BSA three-speed hub gears. Very few derailleur bicycles were imported into Japan in the early years after WW-II.

In 1949, Junzo Kawai visited Europe. He brought back samples of freewheels and derailleurs. He concluded that Maeda should make derailleurs and multi-speed freewheels.

The company name changed from Toa Seiki back to Maeda Iron Works in 1949.

By 1950, Maeda Iron Works had 122 employees and annual sales of about forty million yen (\$110,000).

## **The first SunTour derailleurs**

In 1951, a series of Japan versus U.S. bicycle races were held in Japan. French racing bicycles with Simplex derailleurs were brought to Japan for the races. Shortly afterward, Sanko-Sha came out with a copy of the Simplex Tour de France rear derailleur.

This was the beginning of the Japanese derailleur and multi-sprocket freewheel industry. Shimano, Maeda (SunTour), Cheruvino, Dia/D.N.B./Dynamic, and Sanko were early Japanese derailleur makers. In the mid-1950s, most of them copied the pull-chain Simplex Tour de France racing derailleur.

By 1955, Maeda Iron Works had 177 employees and sales of about 90 million yen (\$250,000).

In late 1956, the first SunTour rear derailleur, the 8.8.8 SunTour Wide, was made for Maeda by the Iwai Seisakusho company. The SunTour Wide was a beefed-up copy of a typical French pull-chain, rod-guided, touring derailleur. It's hard to say if Maeda copied the Simplex Gran Tourisme, the Huret Randonneur, or the Cyclo Tourist, since they were nearly identical. In the 1950s, the French companies copied from each other.

When the Iwai Seisakusho company went bankrupt in 1958, the Maeda factory started making SunTour derailleurs.

Most of the early SunTour derailleurs were stamped SunTour (one word with a capital T). Sometimes they were stamped Suntuor (one word with a lower case t) and sometimes there was a space between the Sun and the Tour (two words). From the very beginning, there was confusion over the „correct“ spelling of the company's brand name, which continues to this day. In this paper, I spell it SunTour.

The Japanese demand for lightweight sport bicycles became significant in the middle 1950s, providing a domestic market for derailleurs and freewheels. The demand for derailleur bicycles lasted only a few years and then the Japanese sport bike buyers switched to three-speed hubs.

In 1959, about 20 million bicycles were in service in Japan and 3 million bicycles were sold. The vast majority of these were inexpensive one-speed urban transportation bicycles. Sales of mopeds were booming and Maeda supplied moped components.

By 1960, Maeda Iron works had 156 employees and sales of 120 million yen (\$330,000).

The first SunTour Skitter was an inexpensive stamped steel parallelogram rear derailleur made in the early 1960s. It was similar to the Huret Svelto.

### **1964 - Invention of the slant parallelogram rear derailleur**

Nobuo Ozaki, the head of Product Development at Maeda, invented the slant parallelogram rear derailleur in 1964 and Maeda obtained worldwide patents on the design.

This was a significant invention. The jockey pulley tracked the angle of the freewheel sprockets and maintained a nearly constant distance (chain gap) between the jockey pulley and the sprocket. For the next twenty years, SunTour produced technically superior derailleurs. SunTour's slant parallelogram broke the image of Japanese components being cheap copies of European components.

SunTour had good patent attorneys and they vigorously defended the slant parallelogram design. All of the major derailleur makers incorporated slant parallelograms when the patent expired in 1984.

The first slant parallelogram rear derailleur was the 1964 Grand Prix. SunTour's timing was good because the quality bicycle market was turning from hub gears to derailleurs both in Japan and world wide. The bicycle races at the 1964 Olympics in Tokyo provided great publicity. SunTour became the largest derailleur manufacturer in Japan.

Derailleur sales went hand in hand with multi-sprocket freewheels. SunTour's Perfect freewheel was a first class design with three splined sprockets and two or three threaded sprockets. It offered a complete range of sprockets between 14 and 28. Over the years, larger sprockets; 30-, 32-, 34-, and even 38-tooth were offered.

JASCA (Japan Sports Cycle Association) was formed in 1963 and expanded in 1964. JASCA promoted Japanese bicycle components with joint advertising and marketing. It consisted of Araya (rims), Daido (chains), Dia Compe (brakes), Maeda-SunTour (derailleurs and freewheels), HKK (chains), Kusuki (handlebars and stems), KKT (pedals), Nankai (coaster brakes), Shimano (hubs, freewheels, and derailleurs), Sugino (cranksets), Taihei (saddles), and Takagi (cranksets).

JASCA had problems promoting competing companies. In 1969, JASCA split into two trade associations: JBM (Japan Bicycle Manufacturers) and JEX (Japan Bicycle Parts Manufacturers Group for Export Promotion).

The JBM group consisted of Araya, KKT, Sakae Ringyo (cranksets), Shimano, Takagi, and Tange (tubing). JBM did not have a non-compete requirement. As Shimano grew, it expanded into components that competed with the other JBM members. JBM broke up in 1984.

The JEX group consisted of Dia Compe, HKK, Maeda-SunTour, Nankai, Sugino, and Taihei. The JEX members agreed not to compete with each other's products. This turned out to be a liability in the 1980s when the market turned to gruppos. When SunTour sold gruppos, they bought the other components from their JEX partners. By this time, Shimano was a much larger company with a much broader sales base.

Maeda SunTour opened the Mihara factory in 1965. Total employment was 171. Sales grew to about five hundred million yen (\$1,400,000). This included 600,000 one-speed freewheels, 400,000 multiple freewheels and 300,000 rear derailleurs.

SunTour made their first front derailleur, the Spirt, in 1966. Most of SunTour's front derailleurs worked „backwards“ to other makers. Pulling the cable shifted from the large to the small chainwheel. The return spring shifted from the small to the large chainwheel. This was a better design because both levers gave you a lower gear when you pulled back. In addition, the down shifts are more severe as you drop to the smaller chainwheel under load. I used to write that SunTour worked correctly and that other front derailleurs worked backwards. Still, many writers criticized SunTour's unconventional design.

The SunTour Grand Prix rear derailleur was followed by the Competition, the Honor, the V, the second Skitter (RD 2200), and the Hero.

Both SunTour and Shimano wanted to export, but developing an export market for derailleurs was a slow process. The French component companies, especially Simplex, were well established. The mass-produced Simplex Prestige rear derailleur was largely plastic and cheap to manufacture. French bicycle companies were the largest exporters of derailleur bicycles and they used French components.

By 1965, SunTour and Shimano taken over the Japanese domestic market for derailleurs and freewheels. Until about 1968, SunTour sold only to the domestic Japanese market. SunTour made better derailleurs but Shimano was the better marketer and by 1970, Shimano had the largest share of the domestic Japanese market.

From 1965 to 1970, „High-Risers“ or „Sting-Rays“ were a hot item in the U.S. The more expensive models had a five-sprocket freewheel with a „Stick-Shift“ lever mounted on the top tube. American high-riser bicycles were one of the first markets for Japanese components. SunTour sold a few derailleurs and stick shift levers but Shimano and Huret were the main suppliers.

Interestingly, SunTour's made an indexed stick-shift lever, called 5 Speed Click, in 1969. SunTour also made a combined freewheel plus rear hub, called Unit-Hub, in 1969 for small wheel bicycles. This was a decade before Shimano offered indexed shifting or freehubs. SunTour did not follow through on either of these innovations.

In 1968, Junzo Kawai made extensive studies and concluded that it was time to enter the international market. SunTour attended the European and American bicycle shows, ran ads in the trade magazines, and made sales calls on the bike makers.

Shimano did better in the U.S. market. Shimano made a first class three-speed hub and they aggressively marketed hubs, freewheels, and derailleurs. They established the Shimano American office in New York in 1965. By 1969, AMF, Columbia, Huffy, and Murray were equipping their low priced lightweight bicycles with Shimano components.

SunTour started advertising in American magazines in 1968, but they had to wait for Japanese bicycle makers, like Panasonic, Fuji, and Bridgestone, to develop an export market for Japanese bicycles with SunTour derailleurs.

The Japanese bicycle industry recognized the potential for export growth of the light weight bicycle market. The Japan Trade Center exhibited Japanese components at the 1970 Amsterdam show. The Japan Trade Center set up bicycle show rooms in Los Angeles and New York in the early 1970s.

Sturmey Archer made 3-speed AW hubs with a SunTour logo on the shell for Maeda in the 1970s. The Sturmey Archer manufacture is not mentioned in either company histories. SunTour made coaster brakes, or had them made, from 1979 to the present.

1970 was a turning point for SunTour. They started construction of a new factory in Shiga. They changed the company name from Maeda Iron Works to Maeda Industries. The SunTour brand name was used for all products. Maeda Industries had 244 employees and sales of 900 million yen (\$2,500,000). They made 1,700,000 one-speed freewheels, 600,000 multiple freewheels, and 800,000 rear derailleurs. Sales of front derailleur and shift levers closely tracked rear derailleurs.

### **1971 to 1975 - The U.S. bike boom**

In 1970, 7 million bicycles were sold in the U.S. 5-1/2 million were children's bikes. 1.2 million were coaster brake balloon-tired adult bicycles. Just 200,000 were lightweight 3-speed or derailleur bicycles.

By 1972, total bicycle sales had doubled to 14 million. Sales of children's bikes remained constant at 5-1/2 million. Sales of adult balloon-tired bicycles fell to about 1/2 million. Sales of lightweight bicycles exploded to 8 million. Between 1970 and 1972, the U.S. market for lightweight adult derailleur bicycles grew forty-fold, from 200,000 to 8,000,000.

In 1972, 1973, and 1974, more bicycles than automobiles were sold in the U.S. The center of gravity of the lightweight bicycle market shifted from Europe to America and it never went back.

The bike boom happened in 1972 because the timing was right. The 1960s and early 1970s were a period of unprecedented wealth for young people in the U.S. There was a growing awareness of fitness and the need for exercise. Traffic congestion and air pollution were widely discussed. A small group of enthusiasts started adult bicycle touring. All of these factors set the stage for a dramatic surge in sales of lightweight bicycles.

The baby boom children had grown and got their first good jobs. The same social and economic forces that allowed 15 to 30-year olds to buy expensive high-fidelity equipment, camping equipment, cameras, and other consumer goodies unleashed the huge cohort of baby boomers onto the bicycle market. It was an easy sell because a lightweight ten-speed bicycle was fast and fun and exotic and a lot cheaper than a good hi-fi. Once the boom started, it fed on its own success.

The oil shortage did not cause the bike boom. The Arab-Israel war began in October, 1973, and the lines at the gas stations didn't happen until the end of the year. The bike boom was two thirds over and bike sales were winding down for the winter. The best that can be said about the connection between the bike boom and the energy crunch was that public concern over the oil crisis kept the bike boom going for an extra year.

In the early 1970s, Simplex and Huret doubled their factory capacity. Peugeot and Motobecane, the giants of the French bicycle industry, had the capacity to churn out low-priced ten-speeds for export. The smaller French bicycle companies had also expanded their production capacity. Exchange rates for exports to the U.S. were favorable for France and less favorable for Japan.

When the bike boom took off in late 1971, the „big three“ European component makers, Campagnolo, Huret, and Simplex, ran out of manufacturing capacity. They could not supply the bike boom demand, which allowed the Japanese component makers to become major suppliers.

Shimano and SunTour had also expanded their factories and they were quick to fill the void. Shimano already had a sales relationship with the low-priced U.S. makers. AMF, Columbia, Huffy, Murray, Rollfast, and Ross used Shimano Eagle or Lark derailleurs on many of their ten-speeds.

In 1972, Japan produced about 5 million bicycles per year and exported more than a million to the U.S. Japanese ten-speed bicycles used either SunTour or Shimano gear train components. Japanese bicycles, with brand names like American Eagle (later Nishiki), Campania, Centurion, C. Itoh (later Bridgestone), Fuji, Panasonic, and Sekai took a significant share of the U.S. market. Some of the Japanese imports were inexpensive children's bikes but Japanese adult ten-speed bicycles got a reputation for quality and value.

When the bike boom exploded, Shimano and SunTour had two advantages over Huret, Simplex, and Campagnolo. First, they had concentrated on the low-priced market. Their low-priced derailleurs offered better performance and value than the low-priced Huret Allvit or Svelto, Simplex Prestige, and Campagnolo Velox or Valentino derailleurs.

Second, the Japanese derailleurs were designed for the „Alpine“ gearing that was popular on low-priced ten-speed bicycles in the U.S. market. Alpine gearing used a 52-40 chainwheel and a 14-17-20-24-28 freewheel. The European derailleurs were designed for European gearing, which used smaller freewheel sprockets.

In 1972, Milremo, a joint venture of Ron Kitching and Andre Bertin, became the European agents for SunTour derailleurs and freewheels. In 1975, Milremo added Shimano Dura-Ace components. This was the beginning of the Japanese invasion of Europe. Milremo selected good performing components that were good value and sold them widely.

When Milremo advertised and distributed Japanese derailleurs, the handwriting was on the wall for Huret and Simplex. Interestingly, a few years later, Ron Kitching opted for SunTour in Britain whilst Andre Bertin opted for Shimano in France.

By 1973, SunTour dominated the middle priced market with narrow-range racing models, mid-range sports models, and wide-range touring models. Unlike Huret and Simplex, SunTour fine tuned the cage pivot location to match the expected gear range. There were SunTour steel models for the low priced market and alloy models for the low-to-medium priced market. All SunTour rear derailleurs had had slant parallelograms and most had an „open“ cage so that the chain could be easily removed. The Maeda-USA office and warehouse opened in New Jersey in 1973.

#### **HIGH NOON - 1974 to 1984**

By 1974, magazine writers, shop mechanics, and bicycle buyers were comparing derailleur performance. It was no contest. A 1974 „Consumer Reports“ bicycle test reported, „SunTour was far and away the easiest to shift and the most certain of arriving at the right sprocket.“ I said much the same thing in my derailleur articles in „Bicycling“ magazine.

SunTour was the preferred derailleur maker in the export market. SunTour's new modern factory in Shiga now made all of the steel and aluminum forgings. The freewheels, derailleurs, and shift levers were assembled in the Mihara and Sakai factories.

From 1970 to about 1984, buyers could select from hundreds of derailleurs. SunTour's rear derailleurs were the best shifting and the best value on the market. Huret's Duopar shifted better on wide range gearing but it was much more expensive. Only SunTour's GT derailleurs and Huret's Duopar could comfortably handle 34-tooth rear sprockets.

SunTour derailleurs were inexpensive, especially on the replacement market. It was hard for snobbish bike writers to accept that a ten-dollar SunTour shifted better than a forty-dollar Campagnolo. Campagnolo's main advantage was their better bearings, which lasted longer. Nuovo Record would shift poorly forever.

SunTour's Power shift levers included a small ratchet wheel that disconnected the friction from the lever when pulling on the cable. SunTour had a patent on this feature. Bar-Con bar end shifters had a lovely „light“ feel and they remained in production until indexed shifting took over. SunTour sold more Bar-Cons than all other bar end shift levers combined. Mixing SunTour Bar-Cons with somebody else's derailleurs was a neat touch that said this bike builder knows his business.

In 1974, SunTour was making Perfect, Procompe, and Winner freewheels. The quality was uniformly high. Gear freaks could get a complete range of sprockets from 13 to 34.

By 1975, Maeda Industries had 291 employees and sales of about 3000 million yen (\$10,000,000). They made 2,300,000 one-speed freewheels, 2,100,000 multiple freewheels, and 1,600,000 rear derailleurs. Shift lever sales exceeded rear derailleurs because of the popularity of the Bar-Cons.

By the end of the bike boom, Huret and Simplex had a reputation for poor quality. SunTour and Shimano, took over the U.S. derailleur market for low and medium priced bicycles. Their combined market share went from about 25% in 1973 to 90% in 1978. By 1983, more than half of the derailleur bikes sold in the U.S. used SunTour. Shimano supplied almost all of the rest. A few Huret Duopars were used on top quality touring bikes and a few Campagnolo Nuovo Records were used on expensive racing bikes.

Figure 13 shows U.S. market for gear train components. I prepared this graph by laboriously counting mass market bicycles in the magazine buyer's guides for each year. I picked an upper price range to excluded small-production models. The chart shows bicycle models, not bicycle sales. Shimano may have sold more derailleurs because they were the main supplier to the low-priced U.S. makers.

The U.S. bicycle market changed continuously. It was necessary to follow the trends (or fads) to survive. The mid-70s was the period of galloping „Carter Inflation“ and bicycle prices more than doubled. In 1976, SunTour had eleven different rear derailleurs in the low and medium price range.

In 1977, Japan produced more than six million bicycles, and exported more than a million. However, by the late 1970s, Japan's labor costs were as high as Europe's, which meant that Japan had to compete on quality, performance, and innovation rather than just price. At that time a dollar bought about 250 yen compared to about half of that today.

### **SunTour's pricing policy**

In 1975, SunTour introduced the Cyclone derailleur, which was a lighter, polished version of the SunTour V. SunTour's policy was to add a markup to production cost to set a „fair“ price. They did not charge what the traffic would bear. In 1975, a Cyclone cost \$16.00, a Campagnolo Nuovo Record or a Huret Jubilee cost \$40.00 and a Shimano Crane cost \$20.00. The Nuovo Record and Crane both weighed about 200 grams and the Jubilee weighed 140 grams. The Cyclone weighed 175 grams and it shifted best.

The result of SunTour's pricing policy was that their top derailleurs were specified for medium-priced bicycles, while their competitor's top derailleurs were found on top-of-the-line bicycles. With 20-20 hindsight, SunTour should have charged more for their top lines and invested more on research and development. SunTour never had more than twenty people working on research and development and this was simply not enough to design and develop and test new products for the 1980s marketplace.

In 1977, SunTour introduced the Superbe gruppo to match Shimano's Dura-Ace and 600 gruppis. Campagnolo had been selling gruppis (complete sets of components with matching cosmetics) for twenty years. SunTour used their partners in the JEX combine to produce the Superbe gruppo of derailleurs, shift levers, cranksets, brakes, hubset, pedals, headsets and seat posts. The price was a bargain. Superbe was designed to match Campagnolo's longevity so the front and rear derailleurs were a bit heavier than Cyclone.

In 1977, SunTour introduced the Vx derailleurs, a cosmetic upgrade of the V models, and the Ultra-6 freewheel and chain. By narrowing the sprockets, spacers, and chain width, they made a 6-speed freewheel that was the same width as a 5-speed and fitted on a 120-mm hub. Two years later, this became Ultra-7 for 126-mm hub widths. SunTour's 1980 New Winner freewheel offered complete flexibility. One body could be set up with 5, 6, or 7 sprockets, wide or narrow spacing, and almost any combination of sprockets between 12 and 34 teeth.

SunTour's narrow-spaced Ultra sprockets and chains sold well, but they did not shift as well as the conventional wide spacing. SunTour bought chains from HKK, their JEX partner.

HKK did not make a good shifting narrow chain. The Sedisport was best chain for Ultra sprockets.

Shimano introduced Positron indexed shifting for low-priced bicycles in 1977. Positron was redesigned three times over the next three years. It sold poorly in spite of heavy promotion. In 1980, SunTour introduced the Mighty Click rear derailleur with matching indexed shift levers. They also sold poorly. The makers of low-priced bicycles were not ready for indexed shifting in 1980.

By 1980, Maeda Industries had 330 employees and sales of 8000 million yen (\$38,000,000). They made 1,500,000 one-speed freewheels, 4,500,000 multiple freewheels, and 3,800,000 rear derailleurs.

By 1981, the bike industry was using the annual model changes in derailleurs and gruppos to provide excitement for each year's „new“ bicycles. SunTour responded with cosmetic changes. Superbe became Superbe Pro. Cyclone became Cyclone II. ARx, AR, and BL (Blue Line) were new lines. SunTour also made a 38-tooth AG (Alpine Gear) freewheel sprocket and an AG rear derailleur to handle it.

SunTour had a long term special relationship with certain bike makers. Fuji got a one-year exclusive on the first Ultra-6 freewheel. Nishiki got a Le Pree with two jockey pulleys.

Shimano introduced aerodynamic AX components in 1981 to deafening silence. Coming after Positron, it really seemed that Shimano had lost their way.

In 1982, the year before mountain bikes became significant, SunTour equipped about 60% of the medium-priced bicycles, compared to Shimano's 30%. SunTour had 13 different lines of derailleurs. From the top they went; Superbe Pro, Superbe, Cyclone Mk II, Cyclone, BL, ARx, Vx, AR, Seven, Volante, Honor, GT, and Mighty Click. Most lines had a racing and a touring model. Vx rear derailleurs came in four different capacities.

SunTour derailleurs, shift levers, and freewheels were the favorites of the replacement market. If you came into a bike store with a poor shifting Simplex or Huret derailleur or a sick Regina or Cyclo freewheel, the standard repair was to replace it with SunTour.

### **1983 - Mountain bikes take over**

The mountain bike was born in Marin County in the late 1970s. The early Breeze, Fisher, and Ritchey mountain bikes used an eclectic mixture of components: Huret Duopar or SunTour VGT rear derailleurs, Simplex front derailleurs, SunTour Power thumb shifters, Magura motorcycle brake levers, and Mafac cantilever brakes.

The 1982 Specialized Stumpjumper and Univega Alpina Sport were the first mass produced mountain bikes. They established that mountain bikes were no fad. SunTour and Shimano kept on top of mountain bike developments. SunTour sponsored a Fat Tire Conference at Crested Butte, Colorado, in September, 1982, and President Junzo Kawai attended.

SunTour moved quickly. In 1983, they introduced the SunTour Dirt Component Ensemble. Sugino and Dia-Compe supplied the triple crankset and cantilever brake set. Almost all 1983 mountain bikes used SunTour's Dirt gruppo.

Everything was on target except the Mountech rear derailleurs. They shifted beautifully. I recommended Mountech after using one to replace the Huret Duopar on my loaded touring bicycle. The fatal flaw was not obvious. The large diameter jockey pulley housed a spring to move the second parallelogram. The 1-inch diameter seal was inadequate. After about a year of road service or a few months of off-road service, the pulley wore out and it was not easily rebuildable.

SunTour also introduced the Superbe Tech series of in 1983 with an elegant enclosed parallelogram. The design was flawed. The internal pivots wore or the return spring failed. It took special tools to repair and reassemble a Tech derailleur and no one tried.

The 1983 New Winner and the later Winner Pro were the most versatile freewheels ever made. A single body could be used for wide spaced 5- or 6-speeds, or narrow spaced 6- or 7-speed combinations with almost complete availability of sprockets from 12 to 34 teeth. It was not a simple system with three different spline sizes, three different thread sizes, and eight different spacers. There were five different 16-tooth sprockets.

1984 was another good year for SunTour. Most of the 1984 bikes had been specified before the problems with Mountech and Superbe Tech were known. However, these problems hurt SunTour's reputation.

The common feature of the problems was SunTour's small size. Their small development staff could not completely check out the outpouring of new models. Mountech and Superbe Tech were rushed to market with inadequate testing. In the early 1980s, when SunTour had 20 people working on research and development, Shimano had more than 200. By this time, Shimano had about 2000 employees compared to SunTour's 350.

Shimano introduced the 105 road bike gruppo and the Deore XT mountain bike gruppo in 1983. Deore XT was introduced too late for the 1983 model year but it was used on about 40% of the 1984 mountain bikes. 105 was a brilliant marketing innovation. It looked expensive and it brought gruppo prestige down to the \$300 bicycles. Shimano gave Aero AX and Positron a quiet burial and carried on as if nothing had happened.

## **SUNSET FOR SUNTOUR - 1985 to 1995**

### **1985 - Indexed shifting and the yen shock**

Mountain bikes and indexed shifting were major changes that took over the bicycling market in about two years. Shimano adapted to these changes and thrived. Indeed, Shimano introduced SIS indexed shifting in 1985. SunTour waited a year on indexed shifting and they lost market share. Huret and Campagnolo moved slowly and they ceased to be a factor in the U.S. market.

SunTour's struggle to keep up with the market changes was exacerbated by the revalued yen. In 1985, the U.S., Canada, Germany, and Great Britain were suffering massive trade deficits with Japan. The five governments met in mid-1985 and signed the G-5 agreement. Over the next six months, the value of the yen went from 240 to 125 per dollar.

The „Yen Shock“ had a profound effect on the bicycle market. In 1985, the major Japanese bicycle makers exported full lines of bicycles to their U.S. dealers. After the yen shock, Japanese bicycle makers could not compete profitably in the low or medium-priced market and that market quickly shifted to Taiwan and later to China. As Japanese wages rose and the yen kept appreciating against the dollar, only high-priced bicycles were exported from Japan.

Many Japanese component companies, including SunTour, rushed to build branch factories in Taiwan but the Taiwan construction industry could not build the new factories fast enough. Shimano had built its Singapore factory in 1973 and they quickly shifted production of the lower priced lines to Singapore.

I remember the 1985 bike show when Shimano introduced the Dura-Ace EX with SIS (Shimano Index System). It did not seem like a huge deal at the time. Biopace non-round chain rings generated most of the hoopla at the Shimano booth. Shimano engineers were very confident. The marketers were concerned about the problems with AX so the shift levers included a friction shifting backup.

Shimano's development of SIS is an interesting story. A year after the Aero AX fiasco, Shimano commissioned a major survey of the U.S. adult bicycle market. The survey concluded that the market had changed from hard core racing and touring enthusiasts to yuppies. The yuppies wanted components that looked and performed like professional racing equipment but were easier to use. This was the same market shift led to products like fully automatic 35mm cameras.

SIS was a major engineering research project. It was much more than shift levers with detents. The key innovation was the SIS Dura-Ace 7400 rear derailleur. SunTour's slant



parallelogram patent had expired. The Shimano's SIS rear derailleurs combined the two spring-loaded pivots, developed by Simplex in the 1940s, with SunTour's 1964 horizontal slant parallelogram. It was the first computer-designed rear derailleur. By optimizing cage dimensions and spring tensions, the design provided a nearly constant chain gap, which was the key to reliable indexed shifting. Shimano developed a factor, Rideable Range of Adjustability, to measure how far a system could be out of adjustment and still be rideable.

After a brief trial, the professional racers refused to use Dura-Ace AX and this was a major cause of the failure of the aerodynamic concept. Shimano was determined that SIS Dura-Ace would be accepted by the professional racers. Shimano's two professional race teams used SIS Dura-Ace in 1984 and 1985. Shimano mechanics and engineers accompanied the teams. Problems were quickly identified, corrected, and reported back to Japan. Shimano learned from their Positron experience about the quality control problems with low-priced bikes. SIS was introduced from the top (Dura-Ace) down to the lower-priced levels. The first SIS Dura-Ace gear trains were properly installed on first class bicycles by trained mechanics.

SunTour peaked in 1985 but no one knew it. The 1985 catalog showed 26 different rear derailleurs. At that time, SunTour offered the best combination of performance and value in conventional friction-shifting gear trains. There were three complete road bike groupsets, Superbe Pro, Superbe, and Cyclone. The new XC mountain bike groupset had a new rear derailleur that eliminated the problem Mountech jockey pulley.

Roller cam brakes were licensed from Wilderness Trail Bikes. There were early problems when SunTour substituted plastic for the brass rollers. Performance quickly degraded in mountain bike service and SunTour had to retrofit brass rollers.

BMX (Bicycle Moto Cross) was a major market and SunTour had full BMX groupsets in three anodized colors. Nevertheless, SunTour's share of the U.S. market fell from 60% to 50%.

The biggest single problem was the revaluation of the yen. Orders had been written in foreign currencies, rather than yen, so SunTour suffered a major loss and had to borrow to finance the move to Taiwan and the development of new mountain bike components.

SunTour hosted three focus group meetings at the 1985 U.S. bike show. Each group had about twenty bike dealers. SunTour asked the dealers what they thought of Shimano's indexed shifting. The consensus response was that it was too complicated and too expensive and it would just be another Shimano fad. Based on this advice, SunTour decided that responding to Shimano SIS could be postponed for a year. This turned out to be dead wrong. The wolf was at the door and SunTour did not have a year of grace.

1986 was a retrenchment year. SunTour introduced the Sprint groupset, priced between Cyclone and Superbe. Sprint was splendid value and everything looked expensive, but it was not indexed. Superbe Pro was dropped.

Shimano proved out the SIS concept with 1985 Dura-Ace. All of the bicycling magazines raved about the performance of Dura-Ace SIS. Shimano also used Bio-Pace non-round chainrings as an effective marketing tool.

In 1986, SIS trickled down from Dura-Ace to the medium-priced 600 and L Series groupsets. SIS was in short supply and Shimano could insist that the bike makers buy complete sets of the critical gear train components. They could also insist that the key dimensions of the bicycle frame meet Shimano's specifications. Indexed shifting bicycles flew out of the bike stores. The maxim was, „If it doesn't click it won't sell.“

Shimano took over most of SunTour's customers in the low priced Original Equipment Manufacturer (OEM) market. Shimano's costs were lower because their low-priced components were made in the Singapore factory. SunTour's Japanese factories were still suffering from yen shock and could not match Taiwan or Singapore prices. SunTour's U.S. market share fell to about 40% and Shimano passed SunTour in 1986. SunTour lost more money and SunTour-USA borrowed against their inventories to help cover the losses.

## 1987 - The failure of AccuShift

SunTour realized that the market had shifted to indexed shifting. 1986 saw a crash program to develop indexed shifting for all of SunTour's gruppos. There was no time for the luxury of trickle down from Superbe to the less expensive lines. 1987 would be the catch-up year. All of the engineering and development was handled by about twenty people.

In 1987, SunTour introduced indexed shifting across the board with five road bike and four mountain bike gruppos. Eleven indexed rear derailleurs were combined with ten indexed shift levers, and nine freewheels with five, six, or seven sprockets and wide- or narrow-spacing.

The new 1987 rear derailleurs for road bikes were redesigned to include a spring-loaded top pivot. This was similar to Shimano's SIS design. SunTour called it Twin Tension. The mountain bike rear derailleurs did not pivot on the top. They had longer chain gaps and needed a chain that was „stiffer“ laterally. Daido (DID) made all of SunTour's chains. Four different chains were needed for the different derailleurs and freewheels. You could not mix and match chains. Using Shimano's criteria, Accushift had a narrow Rideable Range of Adjustability.

The technical problems were fairly minor and could have been overcome with more time and testing. The critical failure was SunTour's inability to „police“ the low-priced market. SunTour desperately needed orders so they could not require complete SunTour gruppos of Accushift-compatible components. They made strong recommendations, but major bike makers, including Schwinn and Raleigh, decided to use up their inventories of old French freewheels, hubs, cables, and casings. Worst of all, they used up the miles of cheap chain in their warehouses. These old components did not provide the critical tolerances needed for reliable indexed shifting.

As the prototypes were assembled and the first bikes were shipped, problems erupted. SunTour rushed engineers and service people from Japan to the factories and the bike shops to identify and correct the problems. Once in a „fire fighting“ mode, the cost of doing business increased dramatically and this chewed up the profits needed to develop new products.

When the SunTour AccuShift-equipped bikes reached the customers, they would not index shift well, or they would work for a few weeks and then go out of adjustment. This led to unhappy bicycle buyers and unhappy bike shop mechanics. The „shop rats“ in the bike stores quickly learned to prefer Shimano SIS and their complaints worked back up the line to the distributors and eventually to the people who were selecting the Original Equipment Manufacturer (OEM) components for the 1988 bikes.

In 1987, Shimano had SIS across the line, Dura-Ace, Santé, 600, 105, Deore XT, Deore, and MS. It was SIS with three years of testing and development. In 1987, Shimano started making narrow bushingless chains and this improved indexed shifting on the narrow-spaced 6- and 7-speed freehubs.

In 1987, SunTour's U.S. market share dropped below 30%. SunTour posted a large loss and they had to borrow more money from the banks. To raise cash, they sold the old Sakai factory that sat on valuable land. The head office relocated to the Mihara factory, which was out in the country and required a long commute by bus.

By 1988, SunTour's Taiwan factory was making the low-end (non-indexed) components. The new mountain bike rear derailleurs got spring-loaded top pivots, which improved their indexed shifting. SunTour's „2000 derailleurs brought indexed shifting down to the \$200 price range.

In 1988, Shimano Deore dominated the profitable high end mountain bike market. SunTour's U.S. market share dropped below 25%. SunTour's Japanese management did not want to hear bad news from SunTour-USA. Management truly believed that SunTour was still on a par with Shimano and that the wheel would turn and SunTour would again be on top.

Although it was no help to SunTour, they certainly were not the only ones to misread the market. Sachs (Huret) and Campagnolo totally missed the switches to mountain bikes and indexed shifting. Their share of the 1988 U.S. market for bicycles selling for less than \$600 was less than 1%.

For 1989, SunTour had four new AccuShift road gruppos: GPX, Olé, Edge, and Blaze. There were two new mid-priced mountain bike gruppos, XCE 4050 and XCM 3040, and four new low-priced mountain bike rear derailleurs. All of the important SunTour rear derailleurs now had two spring-loaded pivots to go with the horizontal slant parallelograms. In 1989, SunTour was almost as good as Shimano but the OEM buyers made their decisions based on 1987. SunTour never get a second chance.

Olé was a sad story. The gruppo was produced in response to a request from a major U.S. OEM for a gruppo to compete with Shimano's Santé. When the time came to place the order, the purchasing manager changed his mind and Olé was an orphan gruppo. SunTour could ill afford such broken promises.

SunTour-USA came up with a great advertising promotion for 1989. They offered a pair of top-of-the-line gruppos to all of the U.S. custom bike builders, one to try out and one to install on a 1989 show bike. It worked beautifully and it helped to slow down the decline of SunTour's market share.

In the 1980s, SunTour's production policy was to satisfy the OEM market first and then ship components for the replacement, or after-market. This was a fine with VGT derailleurs and Perfect freewheels, with a 10-year shelf life. When the component market shifted to annual model changes, the policy meant that SunTour missed the profitable summer season for after-market sales and their U.S. warehouse filled up with unsaleable obsolete inventory.

In 1989, SunTour-USA finally convinced Japan to ship replacement components early in the spring. SunTour had a good year in the replacement market and they did well in the low and medium priced OEM markets. Their market share rose to about 30% and SunTour-USA showed the first profit in four years.

Shimano got two important patents in mid-1988. One covered the design of indexed-shifting rear derailleurs and the other covered indexed shift levers with a friction option. In 1989, Shimano charged SunTour with patent infringement. SunTour counter-charged Shimano with infringing a 1987 SunTour patent on front derailleurs with bulges on the cages. The patent suits dragged on for two years until both sides shook hands and agreed to stop enriching the U.S. legal profession. The worst result for SunTour was that the lawsuits demanded management and engineering attention at a critical time.

SunTour-USA had been headquartered in New Jersey from the early 1970s. In 1989, they moved to Marin County in Northern California to be closer to the mountain bike arena. Only four people made the move to California, but SunTour was able to hire competent replacements in the northern California bicycling hotbed.

The New Jersey warehouse was closed as part of the move to California. The obsolete inventory was sold off for a quarter of book value and eventually wound up in South America. SunTour-USA maintained tight inventory control in their new California warehouse.

However, the working relationship between Maeda SunTour in Japan and SunTour-USA turned sour. Both sides blamed the other for SunTour's misfortunes.

### **1990 - The last hurrah**

By 1990, SunTour was technically on a par with Shimano. AccuShift Plus shaped sprockets competed with Shimano Hyperglide sprockets, and PowerRing chainwheels competed with Shimano Superglide chainwheels. There was a new flexible bushingless chain and X-Press push button shifters for mountain bikes. All of the mountain rear derailleurs were redesigned to work with the revised sprockets and chains. Finally, there was a SunTour freehub, which was essential for wide 7-speed mountain bike hubs. The shift to freehubs destroyed the profitable market for separate screwed-on freewheels.

SunTour did not want a „just as good“ image, but their small research and development group was not producing any more slant parallelograms. By this time, SunTour had only half a dozen engineers working on research and development. SunTour licensed three developments to provide excitement and uniqueness.

First, SunTour licensed the Browning Electronic AccuShift Transmission (BEAST), the swinging gate crankset invented by Bruce Browning of machine gun fame. This eliminated the front derailleur and provided almost instantaneous shifts.

The Beast name was prophetic. The Taiwan factory could not meet the promised deliveries. The first Beasts were 18 months late. By that time, the expensive 1990 bicycles designed for Beasts had been retrofitted with triple chainrings and front derailleurs. The word got out and there were no 1991 buyers. Very few Beasts were made or sold but SunTour paid a great deal for the Browning license and they had to cut back on research on new products.

Second, SunTour licensed Grease Guard fittings from Wilderness Trail Bikes. A small grease fitting allowed grease to be injected into the hubs, bottom bracket and headset, to flush out water. This is a good concept and Wilderness Trail Bikes still sells Grease Guard components at premium prices. The public preferred less effective „sealed“ bearings.

Third, SunTour licensed the Pedersen self-energizing cantilever brake. These performed well, but SunTour underestimated the manufacturing cost and lost money on every set. They were popular on tandems.

Finally, SunTour installed cartridge ball bearings in Superbe-Pro and XC-Pro hubs and rear derailleurs.

By 1990, SunTour and Shimano were close in performance and SunTour had some unique features. However, a „Self-Fulfilling Prophecy“ had set in. SunTour offered 12 road and 15 mountain derailleurs, but the people writing OEM specifications chose Shimano because they assumed that Shimano would sell better. There were fewer and fewer SunTour-equipped bikes. Sometimes the buyer would issue a „mercy“ specification for one SunTour bike in the entire lineup. The bike shops and the buying public assumed that there was still something wrong with SunTour. Their market share slipped back to 25%. SunTour suffered another major loss and the Japanese banks would not make new loans.

In late 1989, Mori Industries Inc., a Japanese steel tubing company, bought Sakae Ringyo Ltd. Sakae made handle bars, chainwheels, pedals, and seatposts. In mid-1990, Mori bought Maeda SunTour. Essentially, Mori assumed SunTour's debts. Shortly afterwards, Mori combined the two acquisitions. The new company was named SR SunTour.

Junzo Kawai was still President of SunTour. He decided to end the deteriorating relationship with SunTour -USA. In early 1990, he closed SunTour's Novato, California office and moved to U.S. sales to Sakae's office in Kent, Washington. There was a severance package. Just one employee was transferred to Kent. A small California office remained open for a year to close down the legal and banking issues.

From 1991 on, my history is based on SunTour catalogs. I have been unable to document the details and the timing of the transfer of SunTour from a Japanese company based in Osaka to a Taiwan company. It is probable that some of the 1992-93 innovations like Micro Drive and the S1 rear derailleur were developed by the old Maeda SunTour design group, but I don't know for sure.

There were no major introductions in 1991. The SL road gruppo replaced Sprint. There were cosmetic changes (and new model numbers) on many of the derailleurs. Four low-priced gruppos were dropped. The market share remained about the same but SR SunTour only competed in the low-price, low-profit market.

Taiwan Sakae Ringyo started making the lower priced SunTour front and rear derailleurs. Micro Drive was the significant 1992 innovation. Smaller bolt circles allowed chainrings like 42-32-20, which offered less weight and better ground clearance. New short-cage rear derailleurs were provided to go with the Micro Drive cassettes. It was a good idea and Shimano copied it two years later.

PowerFlo was SunTour's name for revised freewheel sprockets with „gates“ for easier shifting. SR SunTour's U.S. market share fell to 10%.

There were fewer gruppos in 1993. The catalog showed Sakae front suspension forks with SunTour nameplates. The gear trains got a twist grip shifter and 8-speed freehubs.

The major innovation was the S-1 derailleurs for hybrids and city bikes. These mounted on a special boss on the chain stay. The horizontal slant parallelogram harkened back to the 1960's Altenberger or the 1930's Nivex. The indexing cam was in the rear derailleur rather than the shift lever. You could dump the bike on the right side with no damage to the derailleur. It was a good design and it would have flown ten years earlier when SunTour was a dominant supplier. In 1993, with SR SunTour on the ropes, no one specified S-1.

At the end of 1993, SR SunTour had to recall 300,000 coaster brakes to replace a small spring. SR SunTour paid the dealers \$6.00 to replace the springs. Even though the brakes had been made by a Taiwan subcontractor, the recall was one more nail in SR SunTour's reputation. SR SunTour had only about five percent of the U.S. market.

In 1994, SR SunTour cut back to the products that they hoped would sell. The mountain groupos offered either twist grip shifters or thumb shifters. The three road groupos, Superbe Pro, SL and Blaze were unchanged. Only the top mountain bike groupos were still made in Japan. Everything else was made in Taiwan. SR SunTour provided six- and seven-speed screwed freewheels with Powerflo teeth and ramps. S1 rear derailleurs were promoted for city bikes. By the end of 1994, SR SunTour was offering close out prices on the medium and high priced equipment. The Mihara factory closed its doors and the Shiga factory ceased making bicycle components. The last XC-Pro, XC-Expert, and Superbe Pro groupos were supplied from warehouse stock. When the inventory was gone, there was no more.

At the end of 1994, Mori decided to shut down their bicycle component business in March, 1995. Daisuke Kobayashi and Hideo Hashizume, the former owners of SR Sakae Ringyo, arranged a management buyout. The new management took over in July, 1995. They bought the SunTour name and the SR factory in Taiwan. Mori got out of the bicycle component business. Mori sold the rest of SunTour's Japanese facilities piecemeal.

SR SunTour closed its U.S. office in early 1995. There was a six-page close-out catalog. SR SunTour continued to sell SunTour components in Europe and worldwide where the markets were technically less demanding than the U.S.

All manufacturing moved from Japan to Taiwan. Since their share of the U.S. OEM market was near zero, SR SunTour emphasized the replacement market.

At this point, the old Maeda-SunTour had disappeared, and a new company, SR SunTour, had taken over. SR SunTour maintained two offices in Japan for R & D and for Japanese sales. Taiwan Sakae Ringyo used the SunTour brand name because it had better recognition. Taiwan Sakae Ringyo was a Taiwan component maker, like Falcon, Joy Tech, Long Yi, or SunRace.

SR SunTour owned the name „SunTour“ but they did not own SunTour's patents, intellectual property, or the rights to any of the pre-1995 designs. Various people tried to buy the tooling for SunTour Superbe Pro components, but Mori sold the tooling for scrap.

SR SunTour introduced the XR-150 and XR-50 groupos for 1995. They were plug and play compatible with Shimano's inexpensive Alivio and Acera groupos. SR SunTour called the easy shifting sprockets and chain wheels PowerFlo. An ErgoTwist grip shifter was made for buyers who wanted better quality than Sram.

SR SunTour reopened a U.S. sales office in early 1996. By 1997, SR SunTour had 250 employees. They made inexpensive gear train groupos consisting of cranksets, freewheels and cassettes, front and rear derailleurs, and twist shifters. They also made suspension forks. Their best gruppo was called Giga. The S1 rear derailleur design carried on as the SX-50. Sales grew from 12 million dollars in 1994 to 27 million dollars in 1997.

There were no changes for 1998 except names. The S1 style derailleur was dropped. In early 1998, SR SunTour announced a Superbe crankset as their first step into the medium priced market.

## Comparing SunTour with Shimano

The Shimano comparison is inevitable. Shimano always spent lavishly on research. Ten percent of their employees are engineers. Ten percent of their profits are spent on research and product development. Starting in the early 1980s, Shimano not only adapted to the changing market, they instituted many of the changes. By 1990, Shimano dominated the component market. They have succeeded so well that today's bicycles are defined by their Shimano component gruppo. It's a Dura-Ace bike, or an Ultegra bike, or a 105 bike.

The table below shows how Shimano produced genuine improvements to bicycle components. By 1995, these items were features of almost every quality derailleur bicycle. Shimano was not always the inventor. Often, they just fine tuned old inventions. Items were like the freehub had appeared years earlier, but Shimano refined them and made them part of the modern bicycle. The thing that is not well known is that Shimano grew rapidly in the 1960s. They expanded into a full line of components and fishing tackle. During the peak SunTour years, 1974 to 1984, Shimano was five or six times larger than SunTour.

### Significant Bicycle Developments - 1978 to 1998

	Shimano	SunTour	Sachs-Huret	Campagnolo	Other
Indexed Shifting-Road	1985	1987	1987	1992 (1987)	
Indexed Shifting-Mtn.	1987	1987	1989	1990	
Modern Rear Derailleur	1985	1987	1988	1991	
Freehub	1978	1989 (1969)	1994	1991	
Bushingless Chain	1986	1990	1978	1990	Sedis 1978
Brake-Shift Levers	1990	never	1994	1992	
Hyperglide Sprockets	1989	1990	1994	1994	
Superglide Chainwheels	1990	1990	1994	1994	
Compact Chainwheels	1994	1992	1994	1992	
7-Sprockets	1981	1980	1988	1987	
8-Sprockets	1989	1992	1991	1991	
9-sprockets	1997	1997			
Clipless Pedals	1987	1990	never	988	Look 1985

### Summary

SunTour fell victim to the fast changing bicycle market that started in 1983 with mountain bikes and indexed shifting. SunTour was too small to maintain the kind of research and development department that was needed to survive. It's easy to blame Mountech, Superbe Tech, Beast, or AccuShift, but the real problem was the lack of timely research and development.

SunTour did not charge enough for their top-of-the line components so the market assumed that they were middle-of-the-line. Because of their lower margins, SunTour did not set aside enough profit to expand their research and development facilities in the 1980s and they did not have enough reserves to see them through the 1985 yen shock. The 1985 revaluation of the yen was the overriding disaster.

As a small privately-owned company, SunTour did not have a management chain of command. All of the major decisions were made by one man, President Junzo Kawai. There was no delegation and almost no feedback up the line from the lower level managers. As the pace of change accelerated, it became too much for one man, no matter how well intentioned.

So Maeda SunTour, a fine honest company, came to a sad end. Those of us who watched the bicycle develop and grow in the last twenty years can only regret the Sunset of SunTour.

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Special thanks to Shiro Yagami who dug out the old Japanese records that showed production, employment, and sales up to 1980. He was unable to obtain similar SunTour statistics for the years after 1980. My efforts to get facts on the last decade from other Japanese sources were not very successful. This paper is based on the facts that were available.

## **Lessons for historians**

Richard Schwinn (Chicago Schwinn), Alain and Gerard Huret (pre-Sachs Huret), Henri Juy (Simplex), and Junzo Kawai (Maeda SunTour) all headed family-owned bicycle companies that fell on hard times and either ceased to do business or were absorbed by other companies and lost their identities. The five men have another characteristic in common. They are still alive and they don't talk to historians.

Judith Crown and Glen Coleman wrote the history of Schwinn. Raymond Henry wrote the histories of Huret and Simplex. I have written the history of SunTour. All of these histories reflect the dearth of background details for the final years. Winners are easy to interview. They pass out glowing company histories. Losers tend to be secretive. This certainly applies to the Michaux-Lallement history.

If anyone reading this paper has more facts on the Sunset of SunTour, particularly from 1985 to 1990, I would be delighted to hear from them.

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