2020 Edition (2019 Statistics)

Confederation of the European Bicycle Industry

Colibi-Coliped

ince 1960 Representing the European Bicycle Industr

2020 EUROPEAN BICYCLE INDUSTRY AND MARKET PROFILE

CONEBI

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List of Abbreviations

EPAC: Electric Pedal Assist Cycle
P&A Industries: Parts and Accessories Industries

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FOREWORD

This document is the fourteenth edition of the European Bicycle Industry & Market Profile (BIMP), the economic report carried out by the **Confederation of the European Bicycle Industry CONEBI** (formerly Colibi-Coliped).

The document is based on figures provided by our member associations and data kindly put at our disposal by non-member countries. The data of the import figures are retrieved from Eurostat, the statistical office of the European Union. Data are regularly updated.

It gives an overview of the European Bicycle Industry's activities (production and employment), relevant market data (sales and imports), and highlights the activities implemented at national level to promote Cycling and Bicycle/Pedal-Assist Electric Cycle sales.

We wish to extend our sincere thanks to our member associations and various industry representatives.

BACKGROUND

CONEBI is the Confederation of the European Bicycle Industry. Its members are the national Bicycle Industry Associations in 15 different countries: Austria, Belgium, Bulgaria, Germany, Great Britain, Greece, France, Hungary, Italy, The Netherlands, Poland, Portugal, Spain, Sweden and Turkey.

CONEBI represents its members' interests at European level and beyond: the association maintains regular contacts with the European policy makers and authorities, the United Nations and the World Health Organization and other organizations that pursue common objectives, industry and mobility experts as well as the international press.

CONEBI's aim is the growth of the Bicycle, EPAC and P&A Industries along with the Cycling Culture in Europe.

CONEBI advocates for:

- The proper recognition of Bicycles, Pedal-Assist Electric Cycles and Parts & Accessories Industries in European policies;
- The implementation of the EU Cycling Strategy by the European policy makers;
- Awareness among the EU Institutions of the multiple and valuable benefits deriving from the EU Cycling Economy and, more specifically, from the EU Bicycle Industry (Bicycle, Pedal-Assist Electric Cycle and Parts & Accessories Industries);
- Fair trade and the fight against unfair practices;
- An increased cycle usage throughout the EU and beyond;
- A strong EU Internal Market, favorable for further industrial investment and development;

BACKGROUND

CONEBI fully supports the European (EN) safety standards for bicycles and EPACs and it takes part officially in the consultations of the Working Group on Motorcycles and the Cooperative, Connected and Autonomous Mobility Single Platform, both organised by the European Commission. CONEBI is Founding Member of the World Bicycle Industry Association (WBIA) and through it CONEBI attends the World Forum for the Harmonization of Vehicle Regulations, the Global Forum for Road Traffic Safety and the Working Party on Transport Trends and Economics meetings of the UNECE – United Nations Economic Commission for Europe - in Geneva.

The activities promoted by the Confederation of the European Bicycle Industry go also beyond the European borders: for the past 27 years the joint European CONEBI booth (previously the COLIPED booth) has brought the leading representatives of the European Bicycle Industry to the Taipei Cycle Show (Taiwan).

For more information please visit the **CONEBI** website at www.conebi.eu

THE EUROPEAN BICYCLE INDUSTRY

Around 20 million bicycles and EPACs are sold annually across the EU, out of which more than 13 million are produced there. The European Bicycle Industry generates directly and indirectly more than 120.000 jobs in the Union market with over 900 SMEs.

On average, European citizens own more bicycles than any other means of transport.

Via their national associations, ***all major players on the European bicycle market*** are represented within CONEBI.

Bicycles and EPACs are:

- the most environmentally friendly, energy efficient and sustainable means of mobility;
- the most affordable means of mobility;
- the healthiest and most "social" means of mobility;
- the most time-saving and silent mode in urban areas;
- the most accessible mode of transport;

Simply, the best mobility mode in urban areas.

E-Mobility

The current e-mobility revolution should be a "bottom-up" process, focusing first on EPACs (Electric Power-Assisted Cycles) which were already developed in the past decade. Next will be the more powerful two-wheelers such as e-mopeds and e-scooters, and only later, a wider development will involve electric cars.

In fact, the technology of aluminium alloys and carbon composites, as well as the ever lighter and more powerful batteries that we have been developing in the EPAC industry in the last decade, will undeniably be a source of inspiration for the e-moped and even for the e-cars industry.

"The global shift towards low-carbon circular economy has started and its pace is accelerating. To ensure Europe stays competitive and able to respond to the increasing mobility needs of people and goods, the Commission's low-emission mobility strategy sets clear and fair guiding principles to Member States to prepare for the future."(European Commission, 2016)*. The Bicycle Industry underlines that, in order to respect the Paris Agreement, greenhouse gas emissions from transport will need to be near zero by mid-century and points out that emissions of air pollutants from transport need to be drastically reduced to meet the WHO public health guidelines; in this framework more attention should be given to Cycling as one of the most feasible and immediate solutions against pollution.

*https://ec.europa.eu/transport/themes/strategies/news/2016-07-20-decarbonisation_en

Contribution to the European Union's Ambitious Goals

The EU Bicycle & EPAC Industry has a very important role to play in Europe's ambition to seriously cut Co2 emissions and contribute to policies regarding public health, environment and transport. Being the largest employer in Europe in the Green Industries, we will do our utmost to continuously stress this role.

In line with the EU Green Deal, which CONEBI fully supports as advocate of mobility decarbonization, our companies are a major contributor to the EU Circular Economy. Accelerating the shift to sustainable and smart mobility is now needed more than ever and the EU Bicycle Industry is committed to be a champion of the EU Mobility Revolution.

Moreover, the EU Bicycle Industry is committed to work as well towards the future of Bicycles and Pedal-Assist Electric Cycles in the context of Intelligent Transport Systems, Vehicle Connectivity and Access to Mobility Data. The automotive sector has been working already on those topics and the Bicycle Industry deems it is extremely important to be involved in these discussions, which will bring the transformation of bicycles & EPACs into Smartbikes, for a much safer Cycling environment for Cyclists: indeed Cyclists and Motorcyclists are among the most at-risk road users, and we know that the Smartbikes of the future will have to be detected by cars, buses, trucks and any other road vehicle, but also communicate with the road and digital (urban) infrastructure.

OUR BOARD OF DIRECTORS

CONEBI President Erhard Büchel

"CONEBI represents the European bicycle industry with over 120,000 employees, which is characterized by sustainability, innovation and highest quality.
Cycling is not only 100 percent CO2-free, but also an important factor for the health and recreation of the user. Especially in the current global situation, cycling is, according to the WHO, the healthiest way to get around, besides walking. According to a study by the German GfK and Motiontag, even the bicycle has at times replaced the car as the most important means of transport.

The massive boom in pedelecs is currently generating double-digit growth rates for the industry. With the pedelec market segment, the bicycle has become the interesting solution to traffic problems in conurbations and cities.

High quality and safety standards of pedelecs, bicycles and bicycle components manufactured in Europe guarantee trouble-free use without any hassle. European research and development in the bicycle sector, especially in the e-bike sector, creates many innovations and jobs. Thanks to the local production, the CO2 balance is also very favourable, as the influence of traffic jams due to long transports of imported parts is very limited."

OUR BOARD OF DIRECTORS

CONEBI Vice President
Ton Anbeek

"The European Bicycle Industry is the major innovator when it comes to bicycles and components. Not only are the modern E-bike and Speed-pedelec invented by European companies, but also new materials, production methods and valuable contributions to the green and circular economy are developed by companies based in the EU. We also support the Paris goals on CO2 reduction. The EU producers invest annually hundreds of millions euros in new facilities, R&D and more efficient production as all believe in a solid future for production in Europe. The actual movement of re-shoring and a-shoring confirms the strength of our industry.

At the moment we have more than 120.000 direct and indirect employees, which makes us an important player for the economic health of Europe. CONEBI as a representative body of the national associations and consequently the industrial members of each associations is taking care of the interests of the European manufacturers.

Collecting and supplying reliable market data is an important part of this."

OUR BOARD OF DIRECTORS

CONEBI Vice President
Massimo Panzeri

"The bicycle industry has re-invented its core business for the challenges of the 21th century. New materials, new products, new technical standards have been created and are being developed continuously. Bicycle industry means high technology materials and the development of new products, such as the e-bike, that are changing life and the way of transport of people throughout the world. Bicycles mean better commuting time in urban areas, a better way of life, less CO2 impact and a positive impact on tourism.

Investing in cycling means higher job creation than most of the comparable industries. CONEBI is supporting these ambitious tasks in order to let the European industry grow and reach its challenging targets."

OUR BOARD OF DIRECTORS

CONEBI Vice President Paulo Rodrigues

"The European Bicycle Industry encompasses a wide variety of aspects and new products such as Smart Urban Bikes and Bike Sharing Systems are gaining in importance.

Therefore, it is crucial to work on integrative solutions like MaaS (Mobility as a Service), smart cities and urban mobility with the help of ICT (Information and Communications Technologies) and light electric mobility. This will allow for positive energy, health and environmental impacts."

OUR BOARD OF DIRECTORS

CONEBI Treasurer Sacha Boedijn

"The development of both the European and national regulatory frameworks can and must keep up with the speed of innovation in our industry.

The EU Industry has not only greatly contributed to the concept of Electric-Power Assisted Cycles and worked together with the European Institutions for the development of the highest safety requirements in the Type Approval Regulation, but is now working with dedication as well towards the smartbikes of the future: every rider will be soon connected with the digital infrastructure and the other road users, which will translate in more safety and more integration in the Mobility as a Service-city plans. The Industry welcomes the work of the European Commission on Cooperative Intelligent Transport Systems and is eager to be part of those discussions for the future.

I assume these will not be the last examples, as the speed of innovation increases, with many interesting breakthroughs underway, but these are examples of the importance of the work of CONEBI to act and react on new developments."

OUR MEMBER ASSOCIATIONS

Name of Association	Contact	Web
Austria FFÖ	Wiedner Hauptstrasse 63 Postfach 337 A – 1045 Wien Tel. +43 - 1 50 105 4805 Fax +43 - 1 50 105 289	www.fahrzeugindustrie.at
Belgium AGORIA	Bluepoint Building Bd A. Reyers 80 B – 1030 Brussels Tel. +32 – (0) 2 706 78 00	www.agoria.be
Bulgaria ABPB	jk Hipodruma, bl.120 Entr.V apt.74 BG – 1612 Sofia Tel. +359 - 889-459-536	www.abpb.org
France Union Sport & Cycle	33-35, rue Nungesser et Coli 75016 Paris Tel : +33 (0) 1 47 31 56 23	www.unionsportcycle.com
Germany Z.I.V.	Königsteiner Strasse 20A D – 65812 Bad Soden/Ts. Tel. +49 - (0)61906-5077 0 Fax +49 - (0)6196-5077 20	www.ziv-zweirad.de
Great Britain BAGB	PO Box 1250 GB – Castle Camps, Cambridge, CB214XX Tel. +44-2476-55 38 38 Fax +44-2476-22 83 66	www.bicycleassociation.org.uk
Greece HEL.BI.M.A	Agios Vassilios 265 04 GRC - Patras Tel. +30-2610-993045	idealman@idealbikes.gr

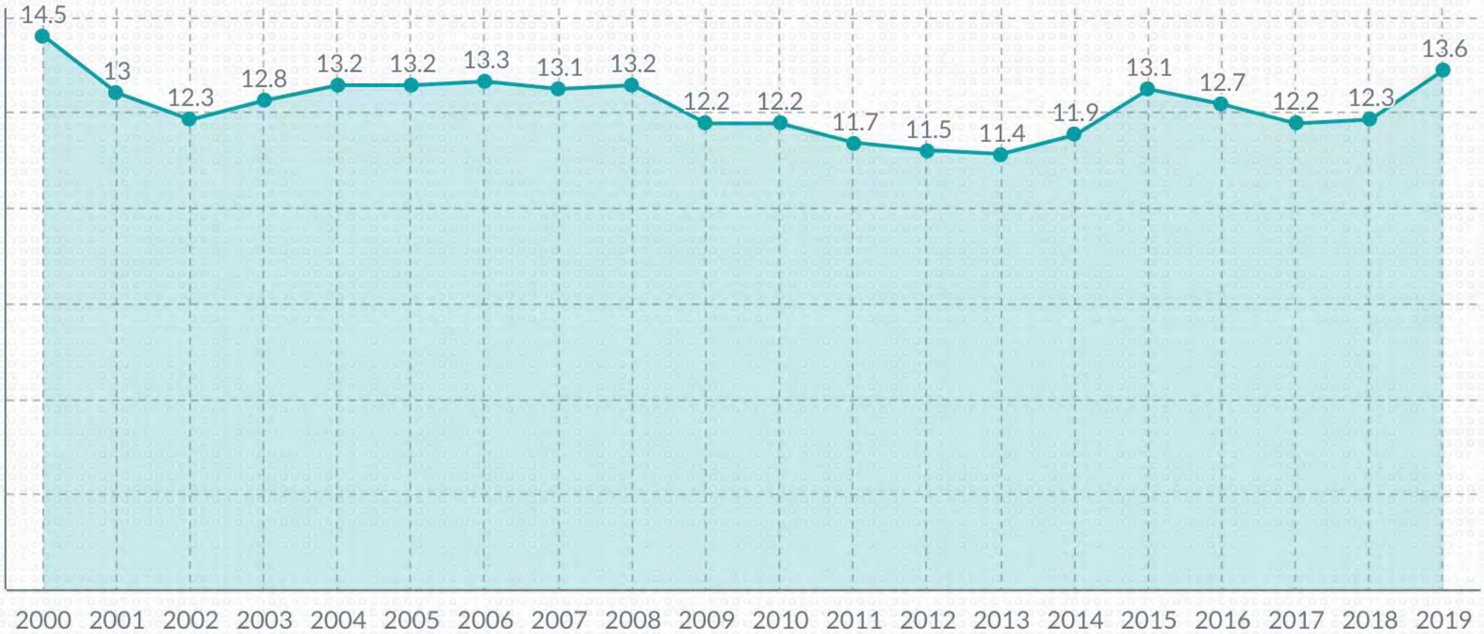
OUR MEMBER ASSOCIATIONS

Name of Association	Contact	Web
Hungary MKKSZ	P/a Accell Hunland Kft. Parkoló tér 1. HU - 5091 Tószeg Tel. +36 - 56 586 505 Fax +36 - 56 586 484	www.mkksz.org
Italy ANCMA	Via A. Da Recanate 1 I – 20124 Milan Tel. +39 – 02 677 35 11 Fax +39 – 02 6698 20 72	www.ancma.it
Poland PSR	ul. Rydygiera 8, bud. 20B/224 PL - 01-793 Warszawa Tel. +48 – (0)43 843 42 93 Fax +48 – (0)43 843 42 93	www.polskiestowarzyszenierowerowe.pl
Portugal ABIMOTA	Borralha, Apartado 299 3754-909 ÁguedaTel. +351 – 234 612 640 Fax +351 – 234 602 018	www.abimota.org
Spain AMBE	C/ Tales de Mileto 2 E – 28860 Alcala de Henares Madrid Tel. +34 - 655 824 085	www.asociacionambe.es
Sweden Cykelbranschen	Klara Norra Kyrkogata 31 / Box 22307 SE - 104 22 Stockholm Tel. +46-8 508 938 21	www.cykelbranschen.se
The Netherlands RAI-Vereniging	Postbus 74800 NL – 1070 DM Amsterdam Tel. +31 - (0)20-504 49 49 Fax +31 - (0)20-504 49 98	www.cykelbranschen.se
Turkey BISED	Hocapasa cad.Demirci is hanı no:28 kat.5 /30 TR - 34110 Eminönü / Istanbul Tel. +90-236-213 0045 Fax + 90-236-213 0050	www.bised.org.tr

EUROPEAN INDUSTRY & MARKET DATA

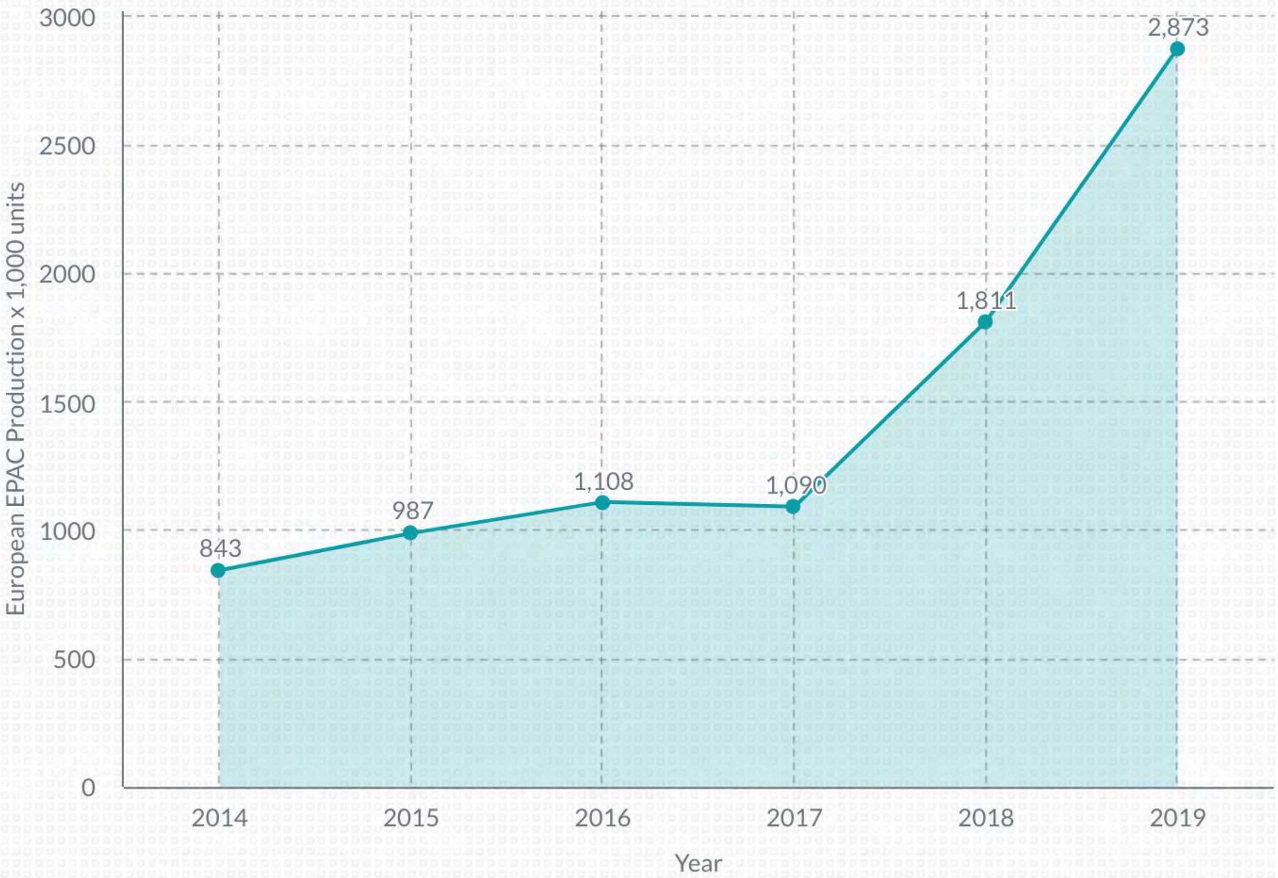
EUROPEAN PRODUCTION FIGURES

EUROPEAN BICYCLE AND EPAC PRODUCTION (EU 28)
(x million units) 2000 – 2019



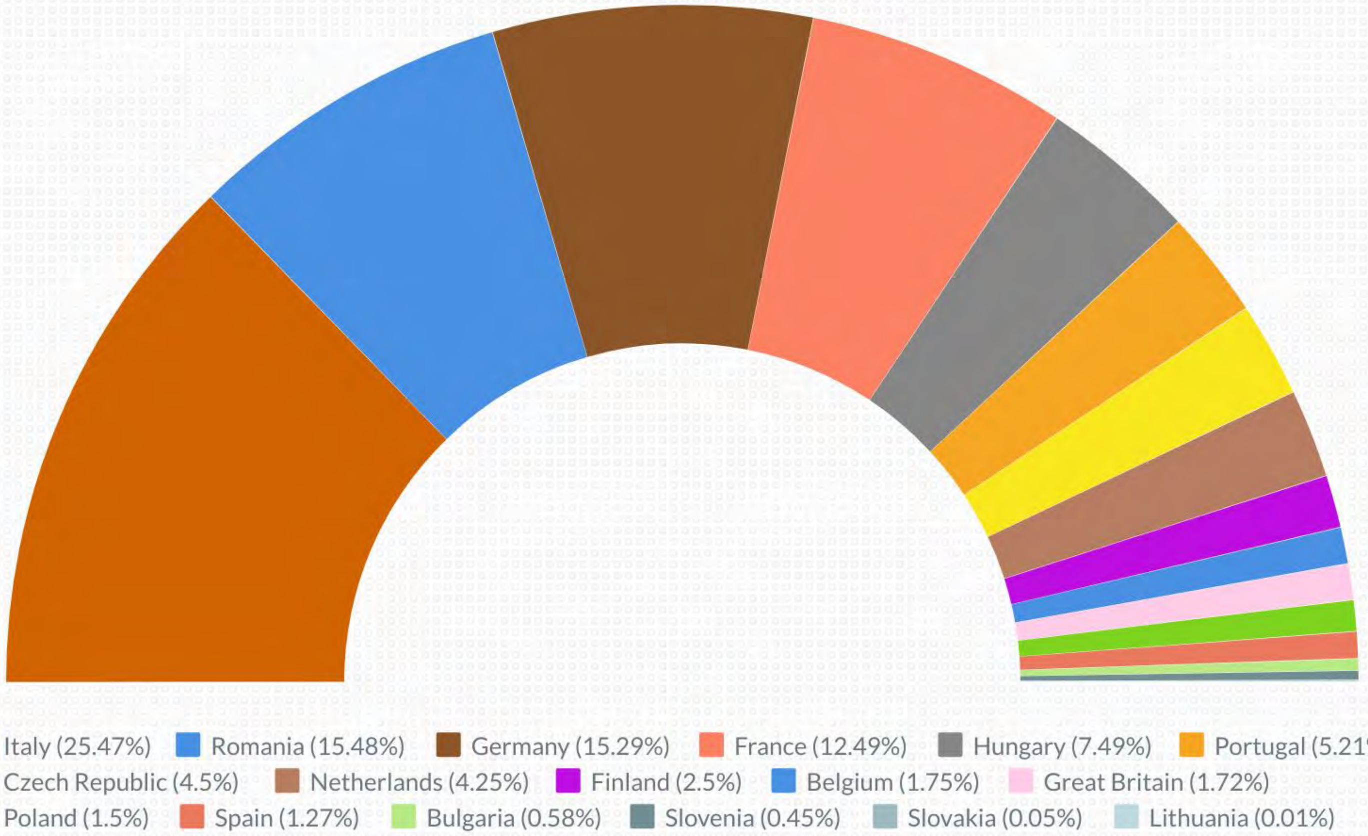
Year	Bicycle and EPAC Production (x 1,000)	Evolution year/year-1 (%)
2000	14.531	
2001	13.009	-10,47
2002	12.272	-5,67
2003	12.828	4,53
2004	13.232	3,15
2005	13.218	-0,11
2006	13.320	0,77
2007	13.086	-1,76
2008	13.246	1,22
2009	12.178	-8,06
2010	12.241	0,52
2011	11.758	-3,95
2012	11.537	-1,88
2013	11.360	-1,53
2014	11.939	5,10
2015	13.152	10,16
2016	12.666	-3,70
2017	12.180	-3,83
2018	12.266	0,70
2019	13.606	10,93

EUROPEAN EPAC PRODUCTION (EU 28)
(x1,000 units) 2014 – 2019



Year	2014	2015	2016	2017	2018	2019
EPAC Production (x1,000)	843	987	1.108	1.090	1.811	2.873
Evolution (%)		17,10	12,26	-1,67	66,25	58,64

2019 EUROPEAN BICYCLE PARTS AND ACCESSORIES PRODUCTION (EU 28 + Turkey)
COUNTRY SHARE (K€)*



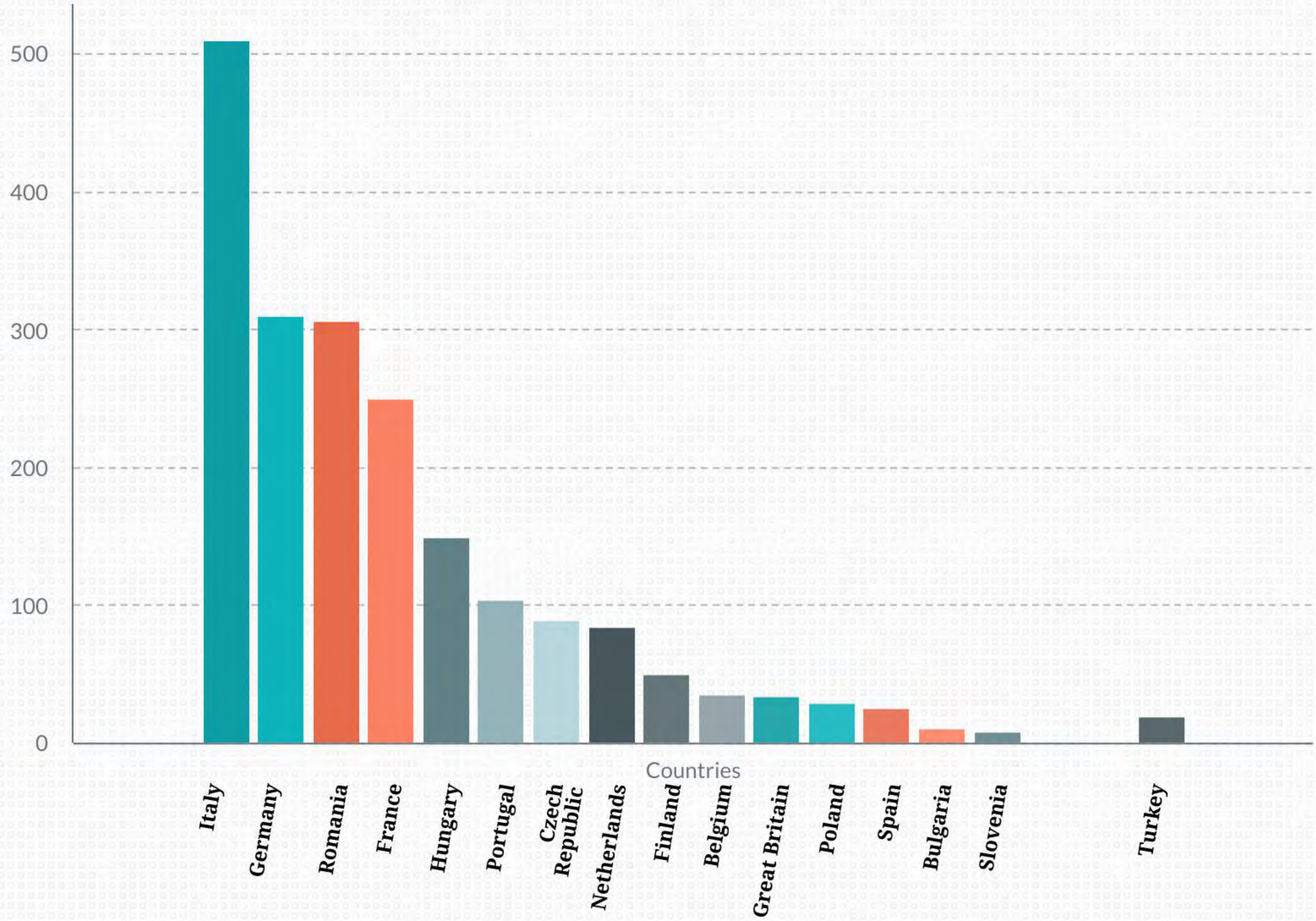
Country	Italy	Romania	Germany	France	Hungary	Portugal	Czech Republic	Netherlands	Finland
P&A Production (K€)	510.000	310.000	306.000	250.000	150.000	104.285	90.000	85.000	50.000
Country Share %	25,47%	15,48%	15,29%	12,49%	7,49%	5,21%	4,50%	4,25%	2,50%

Country	Belgium	Great Britain	Poland	Spain	Bulgaria	Slovenia	Slovakia	Lithuania	EU 28	Turkey
P&A Production (K€)	35.000	34.500	30.000	25.500	11.531	9.000	1.000	124	**2.001.940**	19.750
Country Share %	1,75%	1,72%	1,50%	1,27%	0,58%	0,45%	0,05%	0,01%		

*Values excluding VAT

2019 EUROPEAN BICYCLE PARTS & ACCESSORIES PRODUCTION (EU 28)

Country Ranking (K€)*



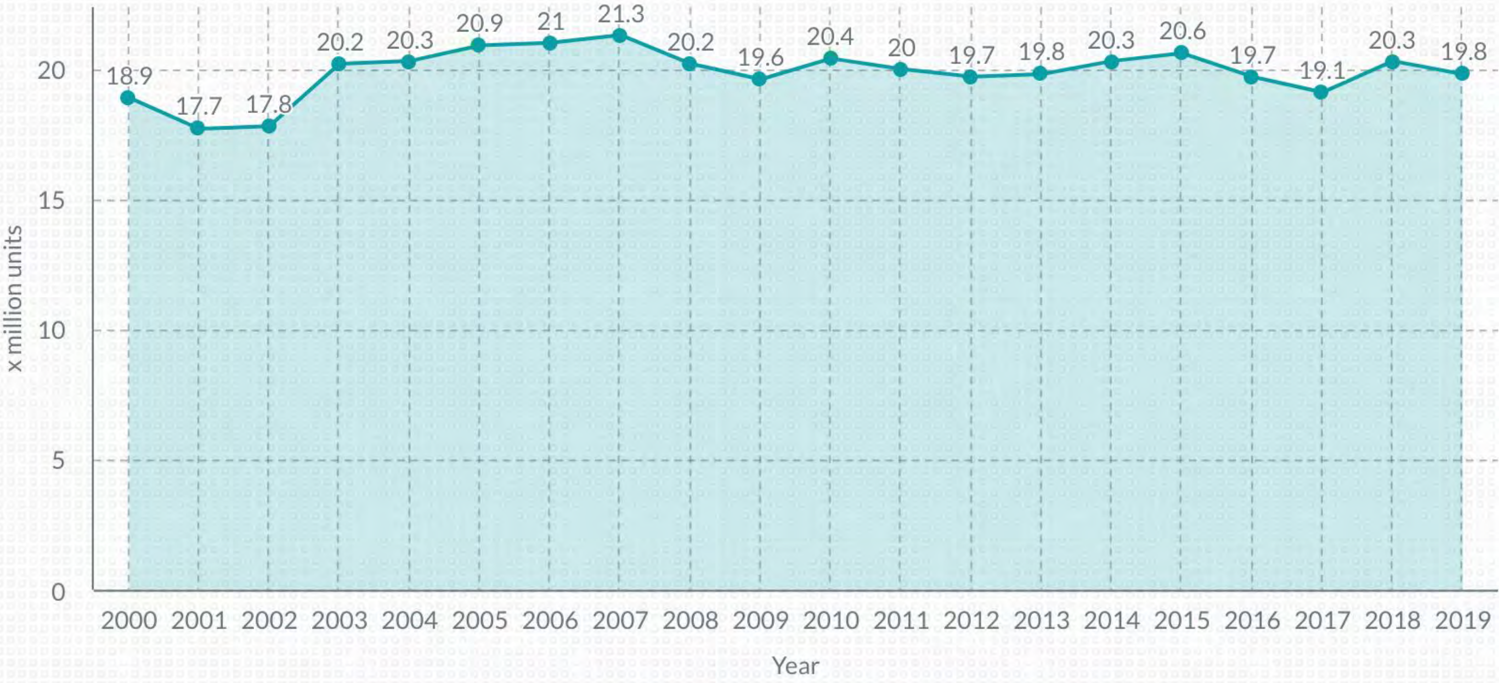
Country	Italy	Romania	Germany	France	Hungary	Portugal	Czech Republic	Netherlands	Finland
P&A Production (K€)	510.000	310.000	306.000	250.000	150.000	104.285	90.000	85.000	50.000
Country Share %	25,47%	15,48%	15,29%	12,49%	7,49%	5,21%	4,50%	4,25%	2,50%

Country	Belgium	Great Britain	Poland	Spain	Bulgaria	Slovenia	Slovakia	Lithuania	EU 28	Turkey
P&A Production (K€)	35.000	34.500	30.000	25.500	11.531	9.000	1.000	124	**2.001.940**	19.750
Country Share %	1,75%	1,72%	1,50%	1,27%	0,58%	0,45%	0,05%	0,01%		

*Values excluding VAT

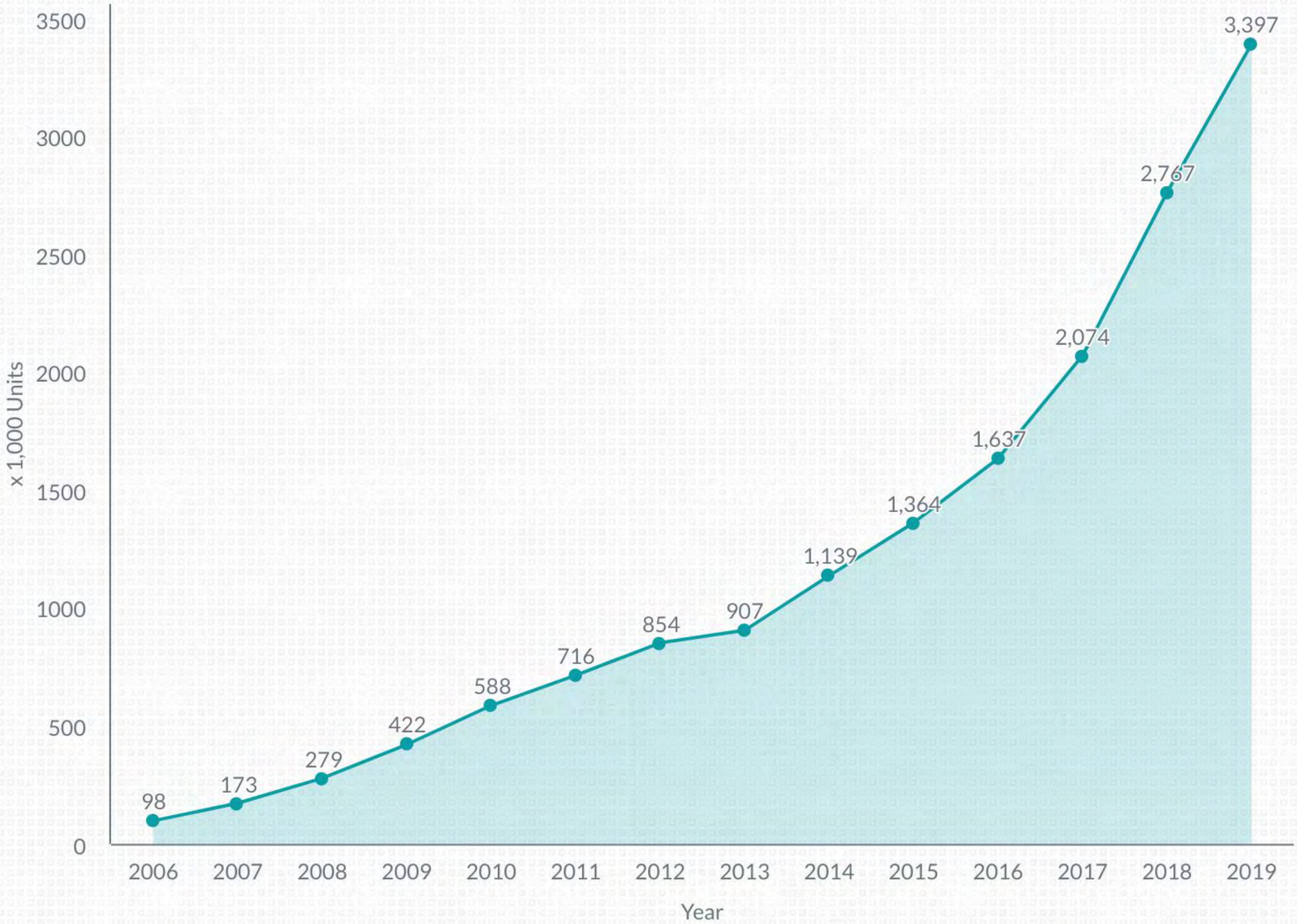
EUROPEAN SALES FIGURES

EUROPEAN BICYCLE AND EPAC SALES (EU 28)
(x million units) 2000 – 2019



Year	Bicycle and EPAC Sales (x 1,000)	Evolution year/year-1 (%)
2000	18.945	
2001	17.745	-6,33
2002	17.840	0,54
2003	20.206	13,26
2004	20.322	0,57
2005	20.912	2,90
2006	21.033	0,58
2007	21.344	1,48
2008	20.206	-5,33
2009	19.582	-3,09
2010	20.431	4,34
2011	20.039	-1,92
2012	19.719	-1,60
2013	19.780	0,31
2014	20.340	2,83
2015	20.633	1,44
2016	19.654	-4,74
2017	19.085	-2,89
2018	20.269	6,20
2019	19.803	-2,30

EUROPEAN EPAC SALES* (EU 28)
(x1,000 units) 2006 – 2019

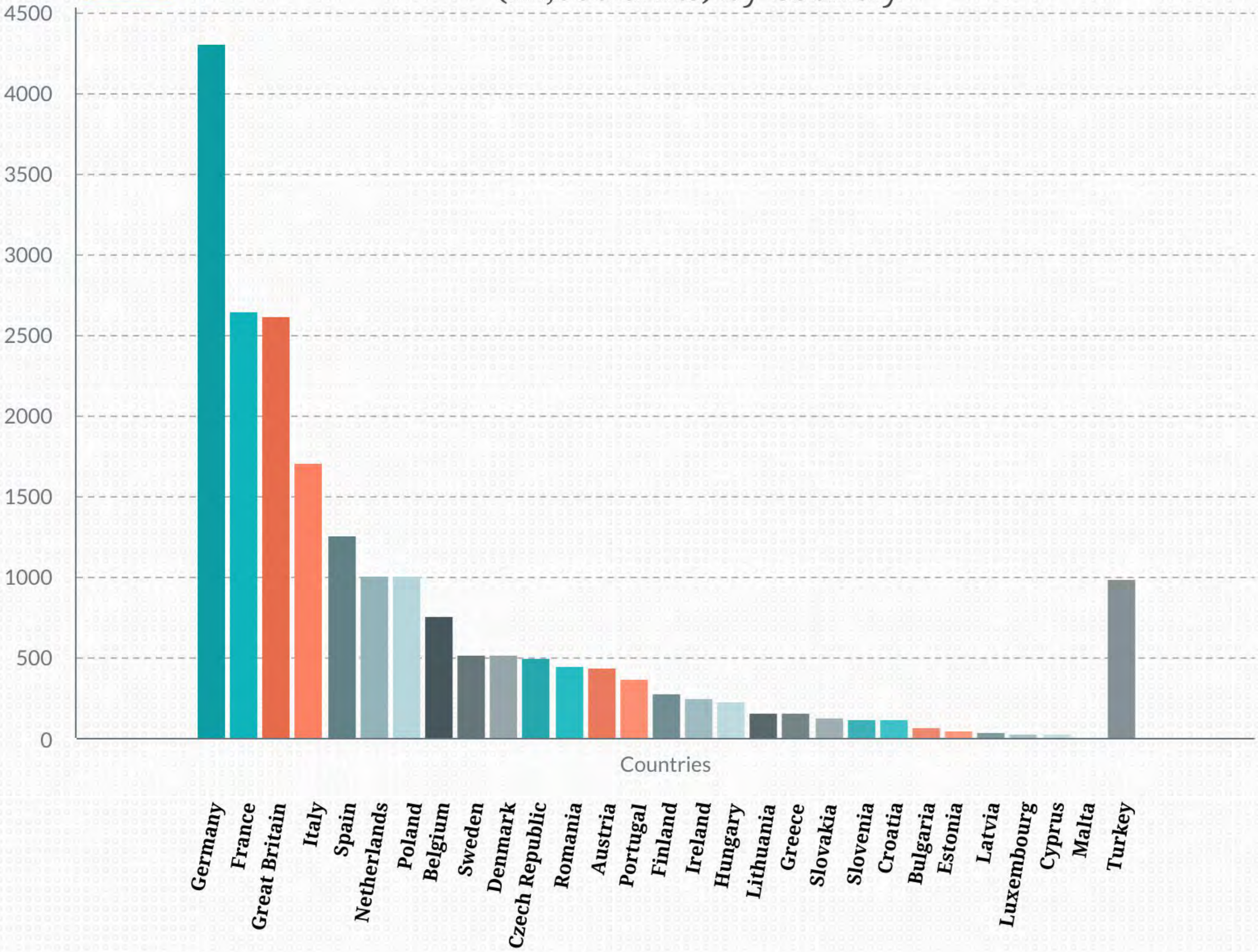


Year	2006	2007	2008	2009	2010	2011	2012
EPAC Sales (x1,000)	98	173	279	422	588	716	854
Evolution (%)		76,5	61,3	51,3	39,3	21,8	19,3

Year	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x1,000)	907	1.139	1.364	1.637	2.074	2.767	3.397
Evolution (%)	6,2	25,6	19,8	20,0	26,7	33,4	22,8

* including Speed EPAC sales

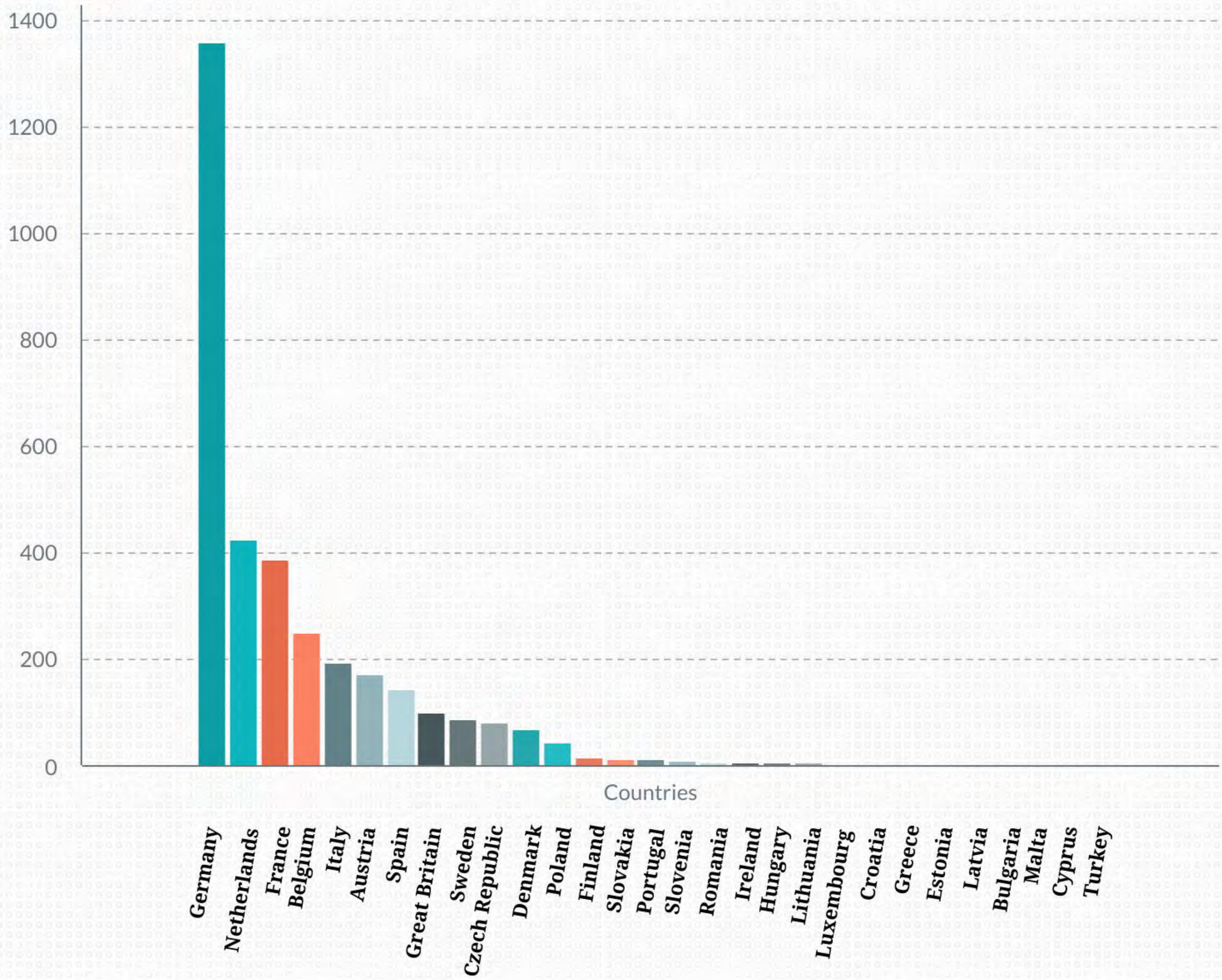
2019 EUROPEAN BICYCLE AND EPAC SALES (EU 28 + Turkey)
(x1,000 units) by Country



	Germany	France	Great Britain	Italy	Spain	Netherlands	Poland	Belgium	Sweden	Denmark	Czech Republic	Romania	Austria	Portugal	Finland
Bicycle & EPAC Sales (x 1,000)	4.310	2.652	2.613	1.713	1.261	1.011	1.010	761	522	518	500	450	439	372	277
Country Share (%)	21,76%	13,39%	13,19%	8,65%	6,37%	5,11%	5,10%	3,84%	2,64%	2,62%	2,52%	2,27%	2,22%	1,88%	1,40%

	Ireland	Hungary	Lithuania	Greece	Slovakia	Slovenia	Croatia	Bulgaria	Estonia	Latvia	Luxembourg	Cyprus	Malta	EU 28	Turkey
Bicycle & EPAC Sales (x 1,000)	248	230	160	159	134	118	118	74	48	37	33	25	11	19.803	988
Country Share (%)	1,25%	1,16%	0,81%	0,80%	0,68%	0,60%	0,60%	0,37%	0,24%	0,19%	0,16%	0,13%	0,05%		

2019 EUROPEAN EPAC SALES* (EU 28 + Turkey)
(x1,000 units) by Country

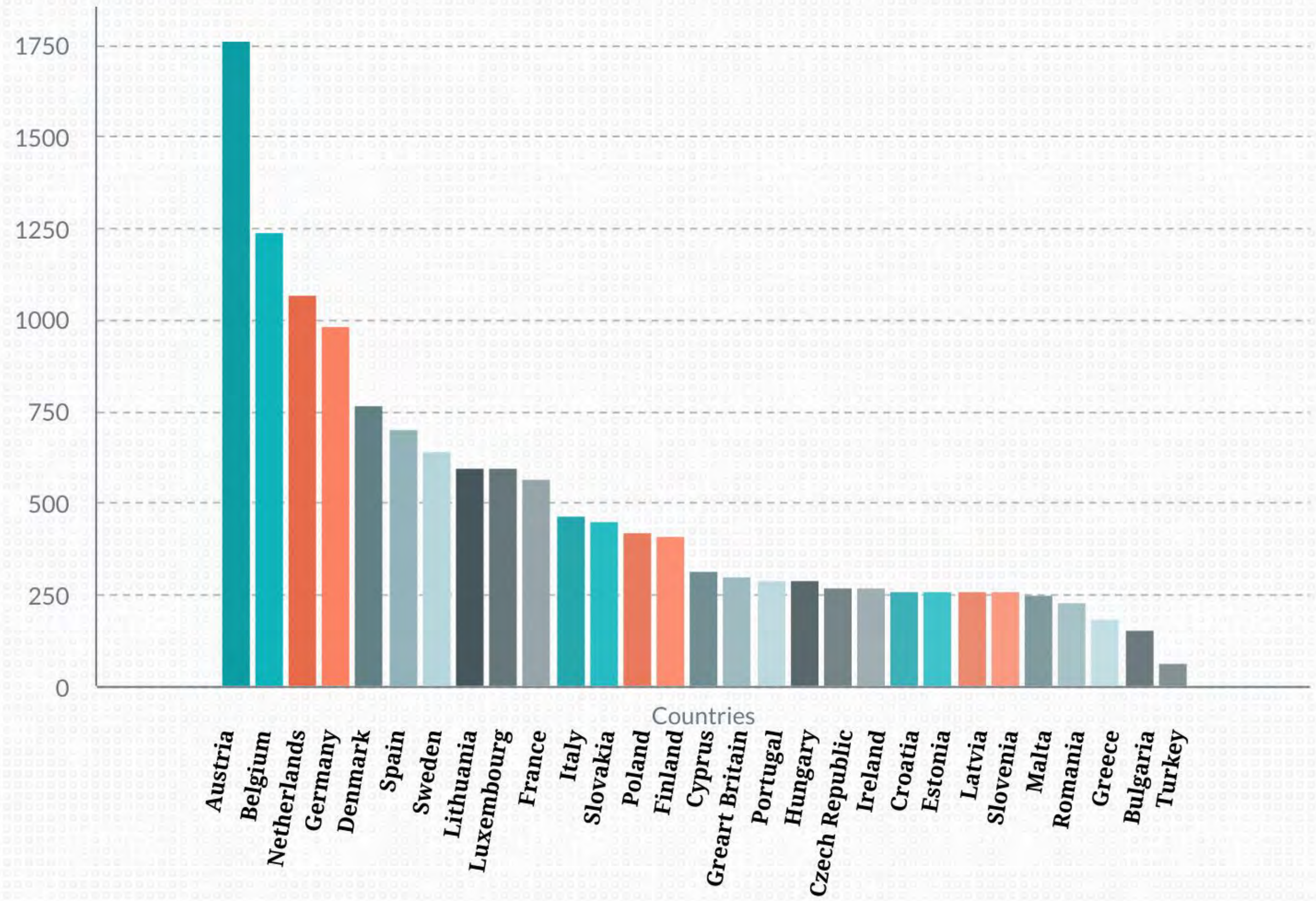


	Germany	Netherlands	France	Belgium	Italy	Austria	Spain	Great Britain	Sweden	Czech Republic	Denmark	Poland	Finland	Slovakia	Portugal
EPAC Sales (x 1,000)	1.360	424	388	251	195	171	143	101	86	80	68	45	17	14	13
Country Share (%)	40,03%	12,48%	11,42%	7,38%	5,74%	5,03%	4,20%	2,98%	2,53%	2,35%	2,00%	1,32%	0,50%	0,41%	0,38%

	Slovenia	Romania	Ireland	Hungary	Lithuania	Luxembourg	Croatia	Greece	Estonia	Latvia	Bulgaria	Malta	Cyprus	EU 28	Turkey
EPAC Sales (x 1,000)	8,0	5,8	5,3	5,0	5,0	3,5	3,0	2,3	1,5	1,1	0,5	0,5	0,1	3.397	2,3
Country Share (%)	0,24%	0,17%	0,16%	0,15%	0,15%	0,10%	0,09%	0,07%	0,04%	0,03%	0,02%	0,01%	0,00%		

* including Speed EPAC sales

2019 EUROPEAN BICYCLE & EPAC AVERAGE PRICE per Country* (€)



	Austria	Netherlands	Belgium	Germany	Denmark	Spain	Sweden	Lithuania	Luxembourg	France	Italy	Slovakia	Poland	Finland	Cyprus
Average Price (€)	1.765	1.243	1.070	982	770	704	645	600	600	566	467	450	420	410	315

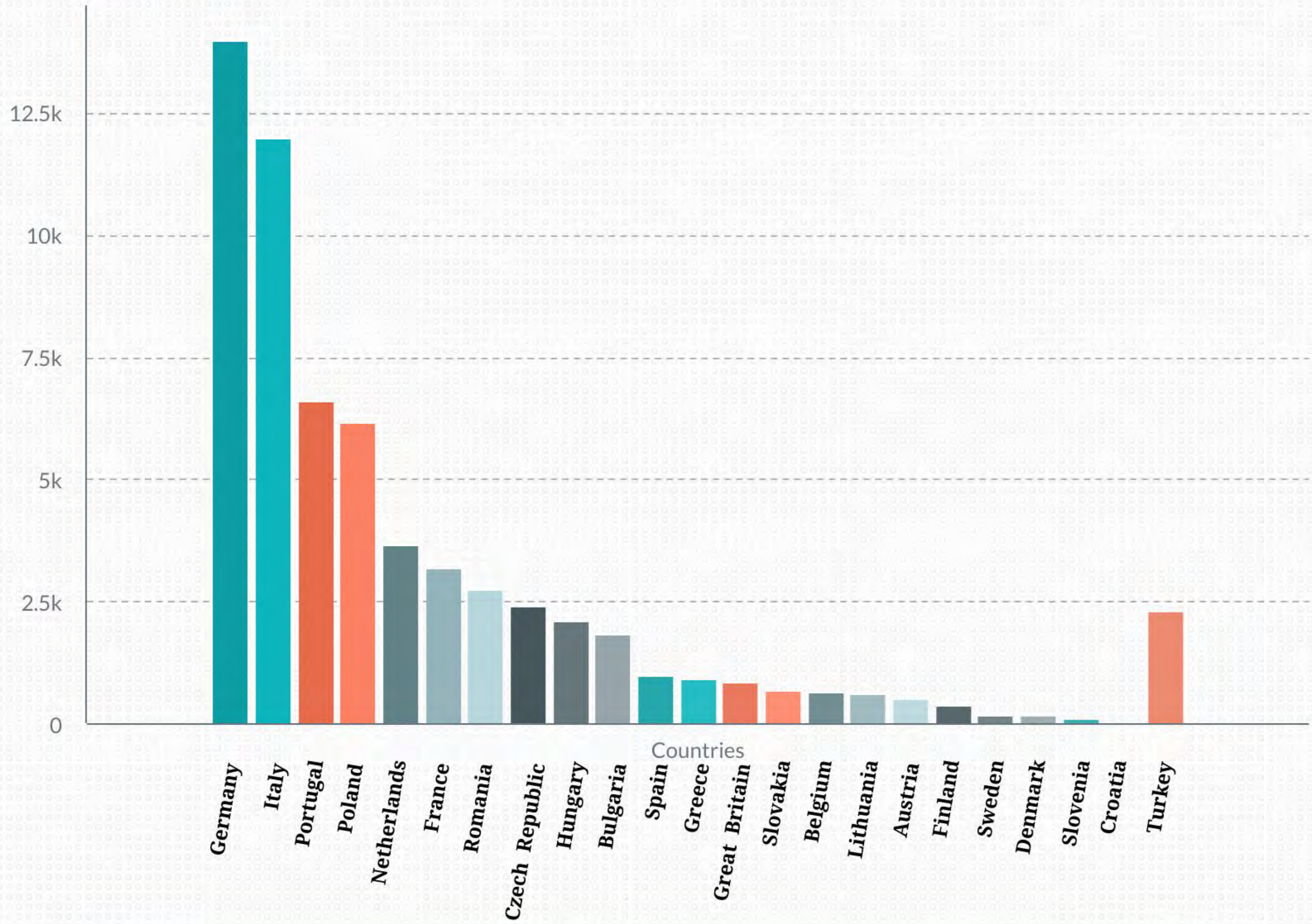
	Great Britain	Portugal	Hungary	Czech Republic	Ireland	Croatia	Estonia	Latvia	Slovenia	Malta	Romania	Greece	Bulgaria	EU 28	Turkey
Average Price (€)	300	290	290	270	270	260	260	260	260	250	230	184	154	665	64

*Average prices include VAT; Data including EPAC sales

2019 EUROPEAN BICYCLE INDUSTRY EMPLOYMENT DATA*

*Since 2016, the employment figures are obtained directly from the bicycle, e-bike and bicycle parts producers of the European Bicycle Industry (including over 900 SMEs). Before 2016, the figures represent data provided by the national CONEBI member associations, which include only data from their members (i.e. not all EU bicycle, e-bike and bicycle parts producers).

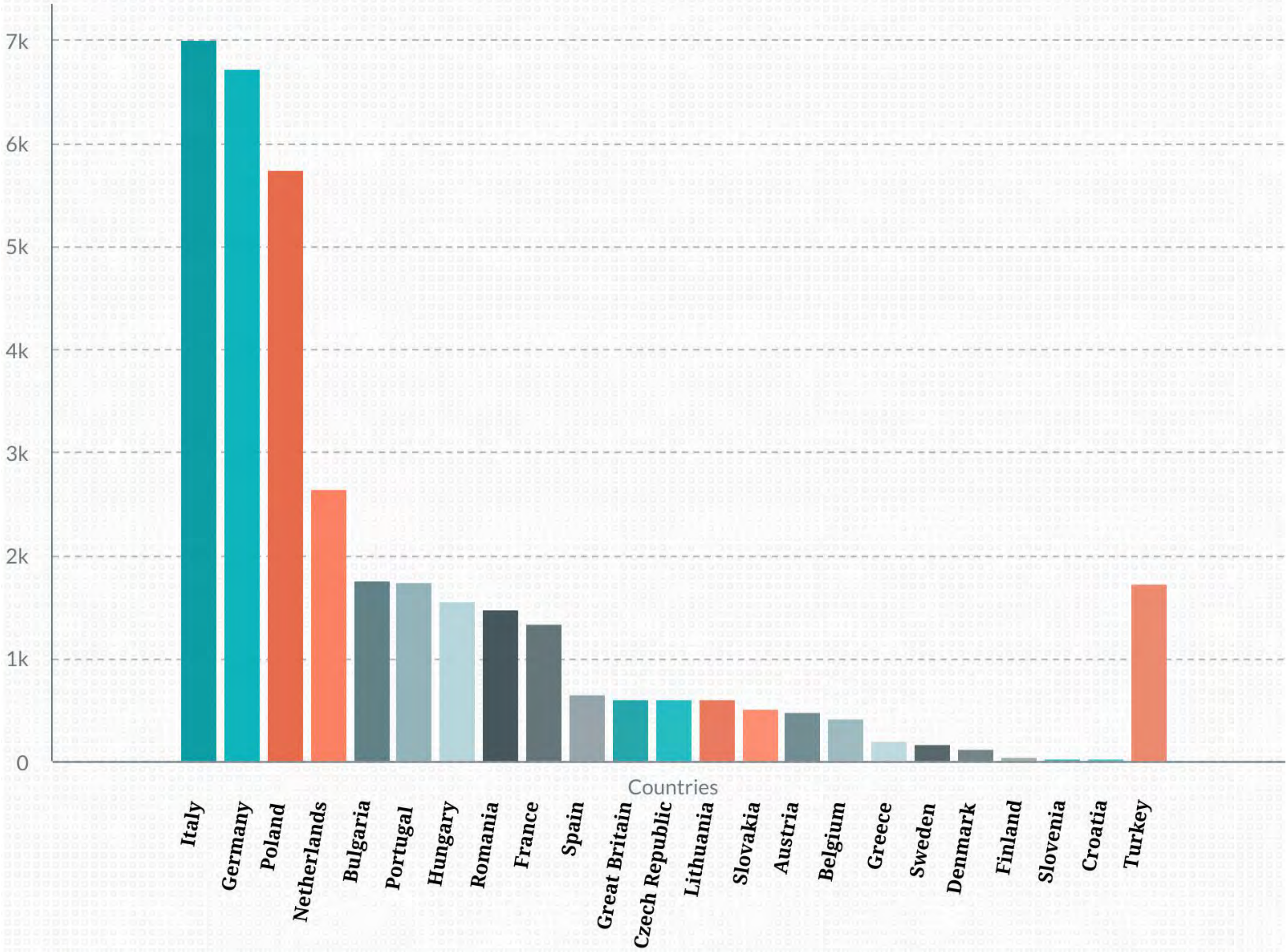
2019 EUROPEAN BICYCLE AND BICYCLE PARTS & ACCESSORIES INDUSTRIES EMPLOYMENT (EU28 + Turkey)



Country	Germany	Italy	Portugal	Poland	Netherlands	France	Romania	Czech Republic	Hungary	Bulgaria	Spain	Greece
Bicycle Employment	6.720	7.000	1.750	5.750	2.650	1.345	1.480	600	1.550	1.764	650	199
P&A Employment	7.280	5.000	4.840	430	1.000	1.850	1.250	1.800	550	70	320	715
Total	14.000	12.000	6.590	6.180	3.650	3.195	2.730	2.400	2.100	1.834	970	914
Ranking	1	2	3	4	5	6	7	8	9	10	11	12

Country	Great Britain	Slovakia	Belgium	Lithuania	Austria	Finland	Sweden	Denmark	Slovenia	Croatia	EU 28	Turkey
Bicycle Employment	605	520	425	600	490	50	175	118	25	25	34.491	1.725
P&A Employment	255	160	209	-	20	315	5	40	70	-	26.179	575
Total	860	680	634	600	510	365	180	158	95	25	60.670	2.300
Ranking	13	14	15	16	17	18	19	20	21	22		

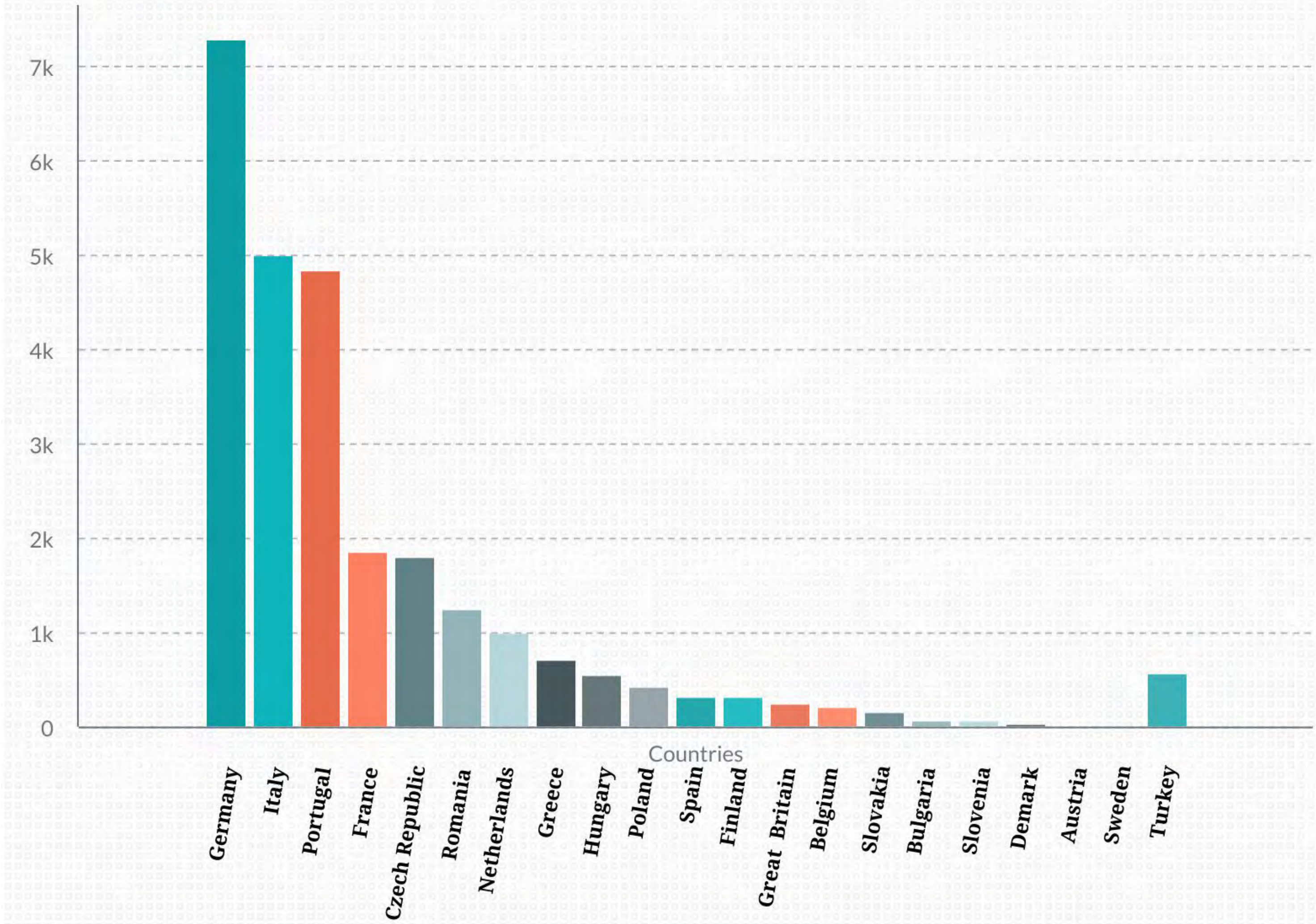
2019 EUROPEAN BICYCLE INDUSTRY EMPLOYMENT (EU 28 + Turkey)



Country	Italy	Germany	Poland	Netherlands	Bulgaria	Portugal	Hungary	Romania	France	Spain	Great Britain	Czech Republic
Bicycle Employment	7.000	6.720	5.750	2.650	1.764	1.750	1.550	1.480	1.345	650	605	600
Ranking	1	2	3	4	5	6	7	8	9	10	11	12

Country	Lithuania	Slovakia	Austria	Belgium	Greece	Sweden	Denmark	Finland	Slovenia	Croatia	EU 28	Turkey
Bicycle Employment	600	520	490	425	199	175	118	50	25	25	34.491	1.725
Ranking	12	14	15	16	17	18	19	20	21	21		

2019 EUROPEAN BICYCLE PARTS AND ACCESSORIES INDUSTRY EMPLOYMENT (EU 28 + Turkey)



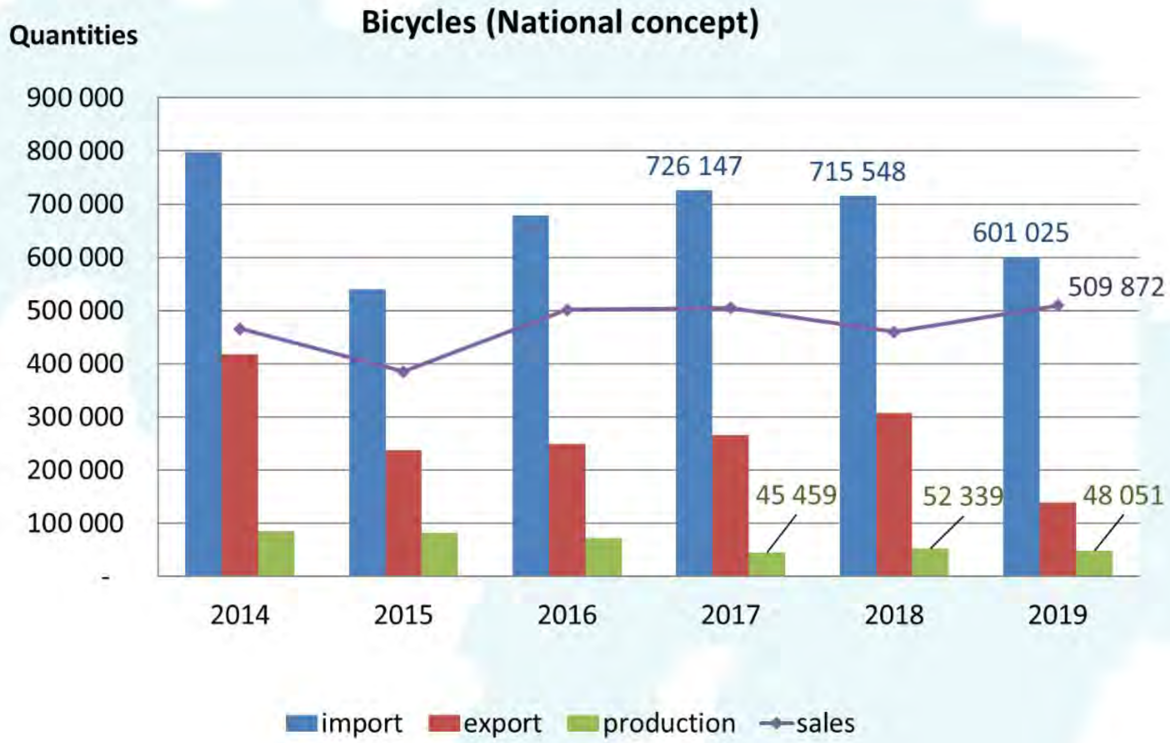
Country	Germany	Italy	Portugal	France	Czech Republic	Romania	Netherlands	Greece	Hungary	Poland	Spain
P&A Employment	7.280	5.000	4.840	1.850	1.800	1.250	1.000	715	550	430	320
Ranking	1	2	3	4	5	6	7	8	9	10	11

Country	Finland	Great Britain	Belgium	Slovakia	Bulgaria	Slovenia	Denmark	Austria	Sweden	EU 28	Turkey
P&A Employment	315	255	209	160	70	70	40	20	5	26.179	575
Ranking	12	13	14	15	16	16	18	19	20		

National Market Summaries

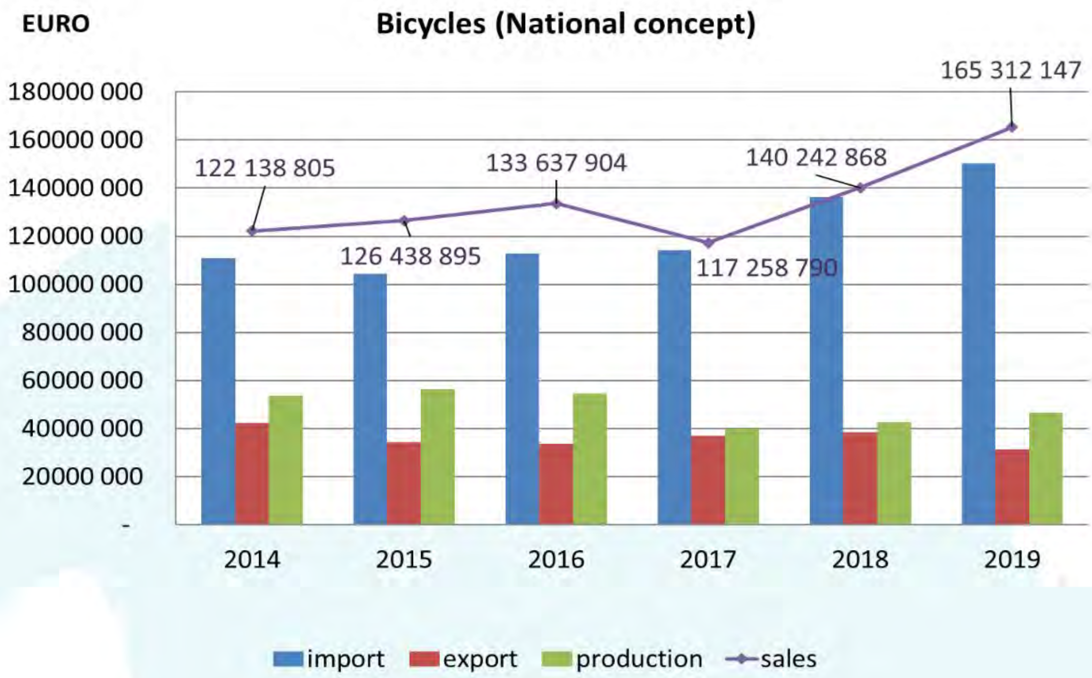
BELGIUM

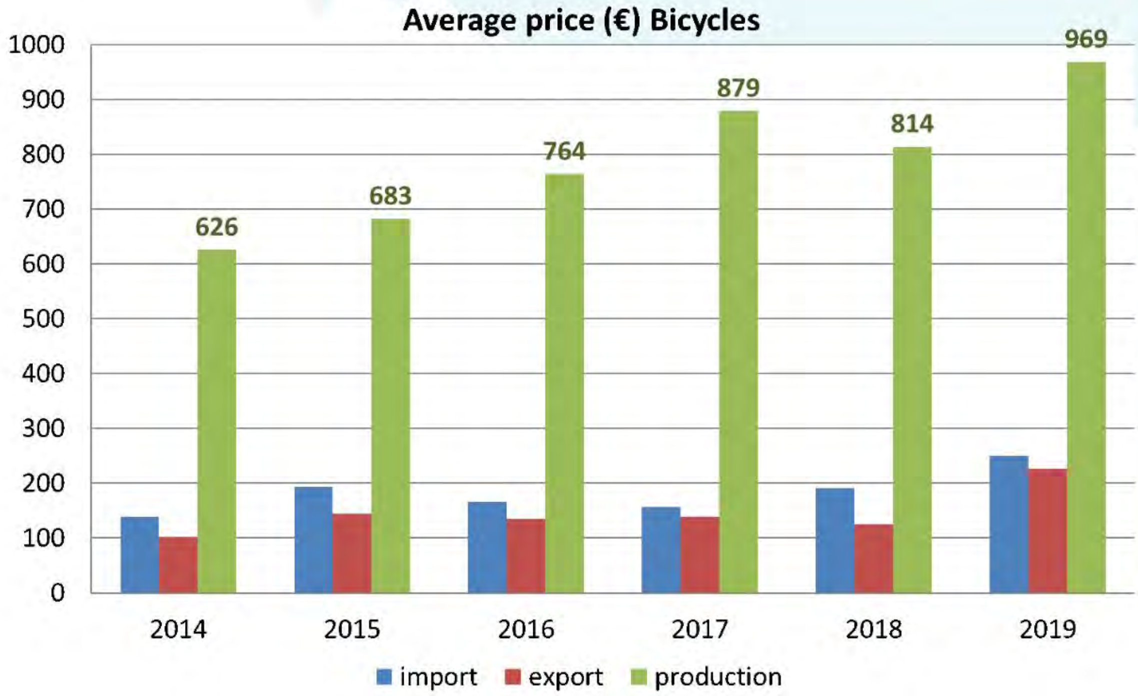
In 2019, the total sales figures of bicycles in Belgium have increased compared to last year and are estimated at a value of about 509,900 bicycles (last year: 485,400 bicycles). Estimated production figures of bicycles in Belgium have dropped somewhat compared to last year.



The import figures for bicycles have strongly decreased in 2019 compared to the past years but it was still around +11% higher compared to the figures of 2015. Looking at the corresponding turnover of the total sales, this figure has again increased, with almost 18% compared to last year. The average sales price of bicycles produced in Belgium decreased somewhat in 2018 but has now again increased, compared with last year's figures.

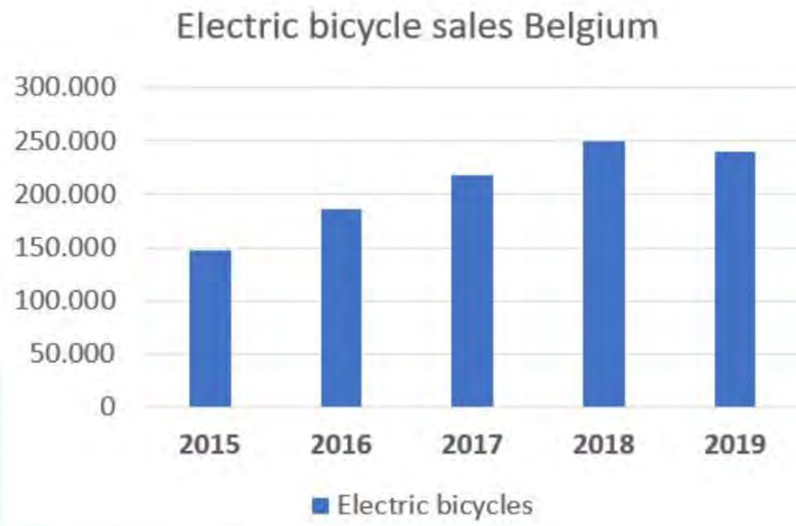
BELGIUM


EURO
Bicycles (National concept)
180000 000
160000 000
140000 000
120000 000
100000 000
80000 000
60000 000
40000 000
20000 000
-
122 138 805
126 438 895
133 637 904
117 258 790
140 242 868
165 312 147
2014
2015
2016
2017
2018
2019
import
export
production
sales


Average price (€) Bicycles
1000
900
800
700
600
500
400
300
200
100
0
626
683
764
879
814
969
2014
2015
2016
2017
2018
2019
import
export
production

BELGIUM

Looking at the segment of electric bicycles, this market has been increasing year after year and had reached a sales figure of 250 000 electric bicycles in 2018. In 2019 the sales of electric bicycles have reached a level of nearly 240 000 electric bicycles, which is still an increase of 10% compared to 2017 figures. The average sales price of an electric bicycle has risen with +9% compared to last year, up to 2 588€ (source: Velofollies and Shimano Benelux).



Source: Velofolies

The new speed pedelec category is growing strongly in Belgium with a total fleet of over 29 000 speed pedelecs at the end of 2019, with almost 12 700 new registrations in 2019. This is an increase of the number of new registrations with +45% compared to last year. This new kind of electric two-wheeler with a speed up to 45 km/h is becoming more and more popular in the Flanders Region in particular. This is certainly an interesting new segment to be followed up.

Region	New Registrations (2019)	Total Fleet (2019)
Flanders	12 132	28 216
Brussels	350	526
Wallonia	207	512
Belgium	**12 689 (+45%)**	**29 254 (+82%)**

Registrations speed pedelecs Belgium (source: *Vlaamse overheid – Departement Omgeving & FOD Mobility and Transport)* Source: Velofolies

BELGIUM

Further, the trends in the Belgian bicycle industry are: a strong focus on high end quality products in order to differentiate from cheaper imported bicycles; customization of bicycles with local assembly that allows for shorter lead times at lower volumes. The Belgian bicycle industry is also becoming more specialized in a certain segment of the bicycle market; clearly an important increase of electric bicycles also targeting a younger public than before (especially for the age category between 30 and 50 years); increasing use of bicycles for commuting; increasing importance of the business-to-business market with professional bicycle fleets and bicycle leasing models. The latter one allowing new recurrent business models also for the local dealer networks.

Nearly all dealers in Belgium offer electric bicycles and 1 out of 2 bicycles sold in 2019 in Belgium through this dealer network have an electric drive. Around 30% of the dealers now offer second hand bicycles. Less than 10% of the local dealers have invested in online shopping platforms whereas in other markets this is becoming more and more important. The category of speed-pedelecs is gaining more and more popularity in Belgium with very strong growth figures.

FRANCE

The cycle market continued to grow in 2019, with sales of 2,33 billion euros, an increase of 10,1% compared to 2018. At the same time there was a slight drop in sales in units (-2%) largely offset by rising average selling prices.

The cycle market continues its dynamic by :

- *An ongoing shift in the market towards electric power assisted bicycles (EPAC).*

  With 388,000 units sold (+12.1%) and an average price up by 10% (€1,749), EPACs now represent 45,2% of the market in value terms and they have established themselves as a pivotal segment in the sector.

  While still widely used for daily journeys (74.7%), sports use is booming (+36.6% increase in volume compared to 2018).

- *The upgrading of bicycles purchased by the French*

  There is a growing demand for quality bicycles (more comfortable for long-term use), at a higher price, including regular bicycles: the average price of bicycles (regular and EPAC) sold in 2019 is now €566, an increase of 15% compared to 2018.

The purchase of bicycles must be supported

While the market is growing in terms of value, sales volumes have been declining for the past two years. Estimated at 3,6% in 2018, this decline in sales continued at 2% in 2019. Regular bicycles suffered particularly badly, with a 4,1% decline in volume. While there was a slight rebound in road bikes, other segments collapsed, particularly mountain bikes (-10%). In the meantime, the skyrocketing growth in EPAC MTB (+32%) could be analyzed as a shift in sales of MTB in the future. This development is likely to follow the same trend as that of daily use of EPACs. EPAC MTBs as well as all EPACs should be supported by national or European subsidies, espacially in the context of modal shift.

FRANCE

BICYCLE AND EPAC SALES*
(x1,000 units) 2000 – 2019

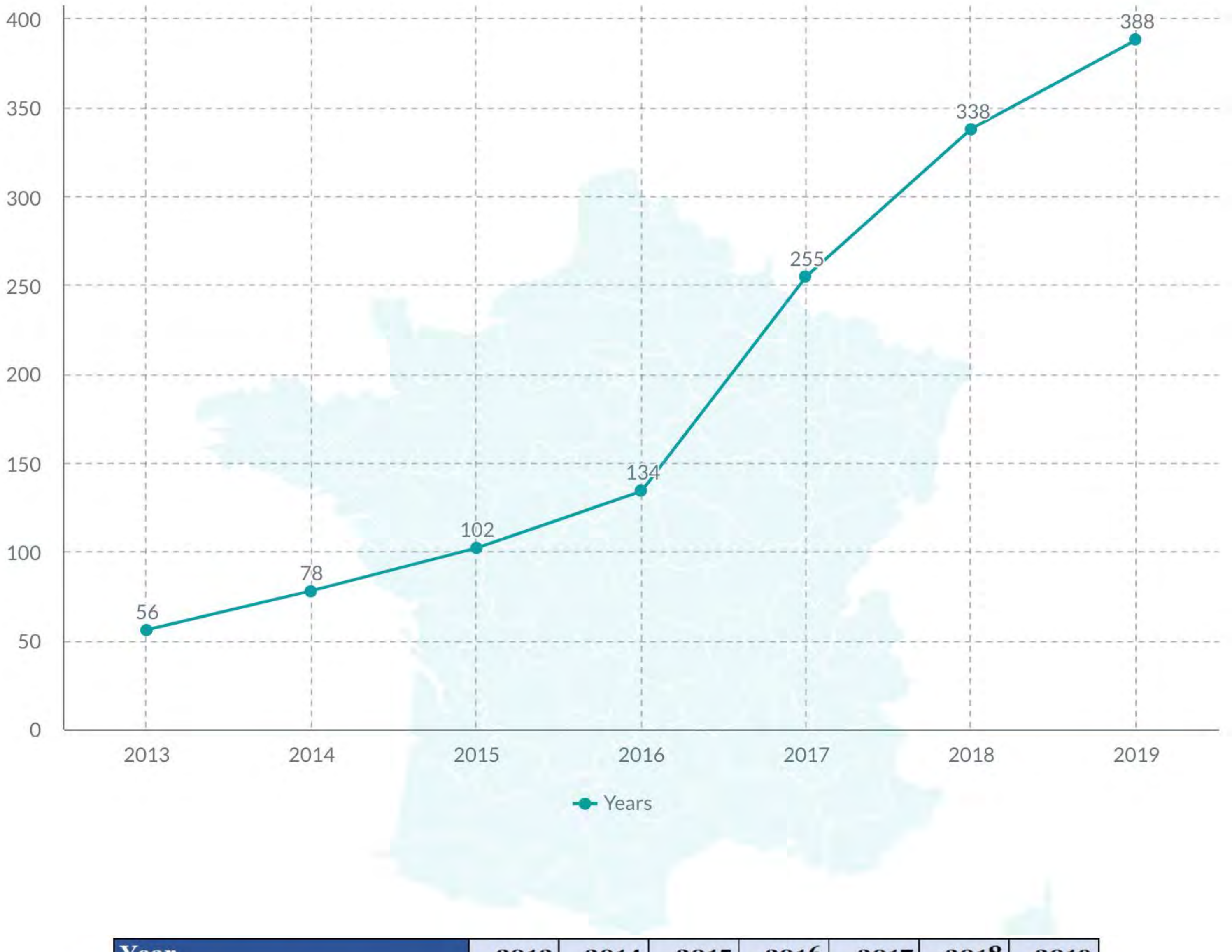
Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Sales (x 1,000)	3.338	2.952	2.986	3.528	3.518	3.764	3.465	3.466	3.336	3.132
Evolution year/year-1 (%)		-11,56	1,15	18,15	-0,28	6,99	-7,94	0,03	-3,75	-6,12

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	3.031	3.197	2.917	2.785	2.977	2.996	3.035	2.807	2.707	2.652
Evolution year/year-1 (%)	-3,22	5,48	-8,76	-4,53	6,89	0,64	1,29	-8,29	-2,74	-2,02

*Sales = Sales to consumers

FRANCE

EPAC SALES*
(x1,000 units) 2013 – 2019



Year	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	56	78	102	134	255	338	388
Evolution year/year-1 (%)		39,29	30,77	31,37	90,20	32,62	14,82

*Sales = Sales to consumers, including Speed EPAC sales

GERMANY

Bicycles and e-bikes stand for healthy and sustainable individual mobility and are an increasingly important component of modern mobility concepts. That is why the federal government, the federal states and many municipalities are pursuing the goal of significantly increasing the proportion of cyclists.

Surveys and statistics show that bicycles and e-bikes in Germany are not only used for leisure purposes, but also for daily journeys. For example, to work, to daycare, to school or training centers, for errands or as a complement to rail and public transport.

The popularity of e-bikes in particular is growing dynamically and has now reached all model groups in the bicycle sector. They allow longer distances and higher average speeds and open up new mobility options in cities and in the countryside.

The sale (in pieces) of bicycles and e-bikes in 2019 was 4.31 million units, 3.1% above the previous year and thus again above the 4 million threshold. While the sale of e-bikes rose again strongly, there was a decline in bicycles of -7.8%.
Sales (in Euro) of bicycles and e-bikes increased to 4.23 billion Euro in 2019. This is an increase of around 34%. Together with the components and accessories area, this results in a total turnover of the German bicycle, e-bike, components and accessories industry of approx. 7 billion Euro.

The significant increase in sales is primarily due to the high sales of e-bikes and the associated, significantly increased average selling price per bike (including e-bikes). In 2019, this was € 982 across all sales channels, around 30% higher than in 2018. It is interesting that the average price of the classic bicycle is also increasing. This continues the trend towards high-quality branded products and vehicles, as in previous years.

There are many reasons for consumer quality awareness. Technical innovations, the high attractiveness of vehicles, but also the increasing importance of bicycles and e-bikes for everyday mobility are, among others, to be mentioned, especially against the background of the political and social discourse with regard to climate change.

Looking at the development of the e-bike market, the ZIV already assumed in September 2019 that the million mark would be exceeded in 2019 for the first time. However, the estimates were again clearly exceeded. 1.36 million e-bikes were sold. This is a quantitative increase of around 39%.

GERMANY

As a result, the market share of e-bikes in the overall bicycle market rose to 31.5%. The e-bike thus achieved market significance that could not be expected so quickly. A medium-term share of the overall market of 40% and in the long term even 50% no longer seems to be excluded.

The reasons for this highly dynamic development of the market have remained unchanged for years: a large variety of models in all product categories, attractive design, innovative further developments in drive and battery technology (keyword: integration) but also in the component area as well as clever business models around the E -Bike (e.g. leasing, cargo or bike sharing). The main argument for buying an e-bike remains the high relevance for today's mobility requirements in leisure and everyday life.

Ultimately, these arguments are also responsible for the fact that the products of the German bicycle industry are in high demand beyond the country's borders. The combined export of bicycles and e-bikes increased by 15% to 1.45 million units in 2019. E-bike exports rose to 531,000, 21% more than in the previous year.

According to the ZIV, the number of bicycles (including e-bikes) grew to 75.9 million in 2019. The proportion of e-bikes it contains is estimated at around 5.4 million vehicles.
Regarding the model group distribution on the overall market (by piece), a slight decline can be seen in the city / urban, trekking, MTB and Dutch and touring bike model groups. As mentioned, the e-bike category and the ATB model group grew. Youth bikes, racing machines / flat handlebar / cross, children's bikes and others (recumbent bikes, tandems, etc.) remained unchanged from the previous year. For the first time, cargo bikes (without a motor) were able to receive independent awards.

The proportion of model groups within the e-bike category (by piece) is as follows. E-Trekking 36%, E-City- / Urban 31%, E-MTB 26.5%, E-cargo bikes 4%, fast e-bikes 0.5%, e-racing machines 0.5% for the first time and e-other with 1.5%. The E-MTB model group again grew significantly.

GERMANY

BICYLE AND EPAC PRODUCTION
(x1,000 units) 2000 – 2019

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Production (x 1,000)	3.400	3.000	3.045	3.203	2.940	2.714	2.490	2.400	2.418	2.248
Evolution year/year-1 (%)		-11,76	1,50	5,19	-8,21	-7,69	-8,25	-3,61	0,75	-7,03

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Production (x 1,000)	2.229	2.288	2.211	2.162	2.139	2.186	1.971	1.733	1.855	1.842
Evolution year/year-1 (%)	-0,85	1,78	-0,81	-5,51	-3,26	2,20	-9,84	-12,08	7,04	-0,70

GERMANY

PARTS & ACCESSORIES PRODUCTION*
(M€) 2000 - 2019

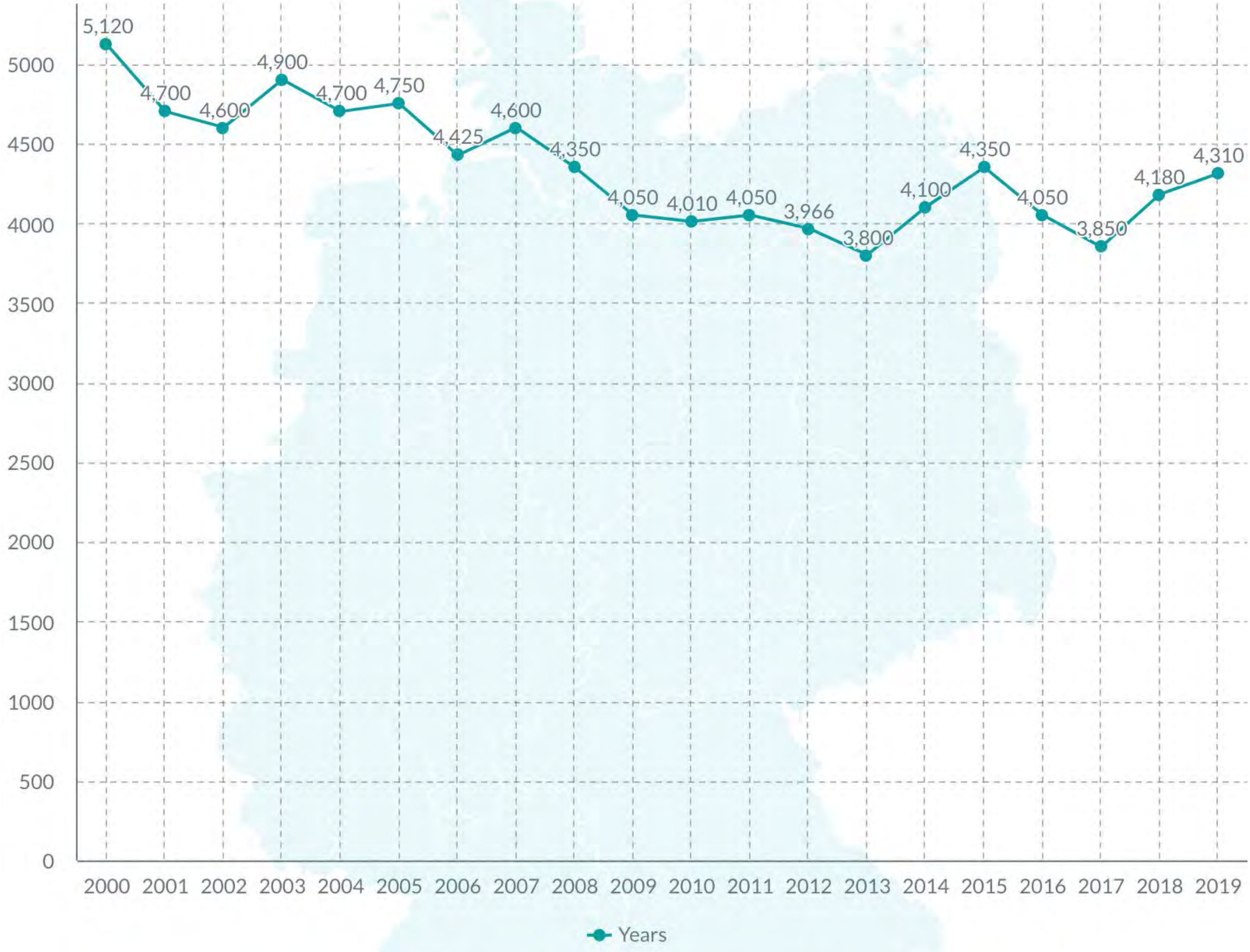
Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
P & A Production (M€)	199	179	171	165	163	152	161	186	191	180
Evolution year/year-1 (%)		-10,05	-4,47	-3,51	-1,21	-6,75	5,92	15,53	2,69	-5,76

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
P & A Production (M€)	183	210	260	265	286	298	298	305	306	306
Evolution year/year-1 (%)	1,67	14,75	23,81	1,92	7,92	4,27	-0,07	2,35	0,33	0,00

*Values excluding VAT

GERMANY

BICYCLE AND EPAC SALES*
(x1,000 units) 2000 - 2019



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Sales (x 1,000)	5.120	4.700	4.600	4.900	4.700	4.750	4.425	4.600	4.350	4.050
Evolution year/year-1 (%)		-8,20	-2,13	6,52	-4,08	1,06	-6,84	3,95	-5,43	-6,90

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	4.010	4.050	3.966	3.800	4.100	4.350	4.050	3.850	4.180	4.310
Evolution year/year-1 (%)	-0,99	1,00	-2,07	-4,19	7,89	6,10	-6,90	-4,94	8,57	3,11

*Sales = Sales to consumers

GERMANY

EPAC SALES*
(x1,000 units) 2011 - 2019

Year	2011	2012	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	310	380	410	480	535	605	720	980	1.360
Evolution year/year-1 (%)		22,58	7,89	17,07	11,46	13,08	19,01	36,11	38,78

*Sales = Sales to consumers, including Speed EPAC sales

GREAT BRITAIN

PRODUCTION

The UK manufactured around 137 000 units of conventional bikes in 2019. The rise from last year's figure of around 117k units reflects some organic growth and new market entrants. As in previous years, this figure is based on a survey of known producers and is likely an underestimate of UK production. It is notable that HMRC figures indicate that import of frames to the UK has increased in recent years. On this basis it seems likely that additional UK assembly of complete cycles is occurring which is not accounted for in the production figures which we have been able to compile.

The UK market is otherwise principally supplied with bicycles imported from the Far East.

The figure provided for the value of UK part and accessory production is an estimate based on combining sparse data from some producers with a conservative estimate made for non-reporting producers. The reported figure is therefore also likely to underestimate the true value of UK production.

EMPLOYMENT

The figures given are for employees directly involved in cycle or P&A manufacture, and are estimates based on surveys of known producers. They are likely to be underestimates. A 2018 study commissioned by the Bicycle Association (see "Economic contribution", below) suggested that the total of all jobs generated by cycling in the UK is far higher at around 64,000 FTE (full time equivalent) employees.

SALES

The unit sales figures in this report are estimates based on the official import statistics published by Her Majesty's Revenue and Customs (HMRC) for tariff code 87120030. The HMRC data gives the total number of units and their Pound Sterling value at the port of entry. It is not broken down by type of bicycle, except for EPACs.

GREAT BRITAIN

Please note that in this report, UK sales totals for bikes and e-bikes from 2016 onwards have been revised compared to previous editions. This follows the identification of discrepancies which were traced to legal changes to HMRC reporting processes in May 2016. For 2016 e-bike sales a reasonable estimate has been provided, because customs figures were not reliable before the tariff code change in 2017.

In early 2020 the Bicycle Association launched a new **Market Data Service**[1]. This collects sales data direct from retailers, both generalist and specialist, and to date (June 2020) includes over 7150,000 stock keeping units (SKUs) classified across bikes, parts, accessories and services, covering approx. 60% -70% of the bike and e-bike sales in the UK market, and at least 50% of the total market and growing. With monthly updates, this provides detailed, accurate and timely data to participating BA members via a flexible online dashboard.

Headline data from the Market Data Service will be included in our reporting for the next CONEBI BIMP report, to supplement the figures we will continue to derive from HMRC data. To enquire about access to this new data service, please visit the Bicycle Association website: www.bicycleassociation.org.uk.

VALUES

No direct data on UK cycle sales value totals is available, and we are not confident that available estimates are robust. We hope to provide actual measured sales values in future years via our Market Data Service.

ECONOMIC CONTRIBUTION

In 2018 the Bicycle Association commissioned a report on the economic value of the cycling sector to the British Economy. This is available for download[2]. The summary includes the key findings:

[1]https://www.bicycleassociation.org.uk/market-data
[2]http://www.bicycleassociation.org.uk/wp-content/uploads/2018/08/The-Value-of-the-Cycling-Sector-to-the-British-Economy-FINAL.pdf

GREAT BRITAIN

"Drawing on the existing literature, and making some broad provisional calculations from this data, we estimate that ***cycling contributes around £5.4 billion a year to the [UK] economy****, with the larger share of this, £4.1b, coming from wider impacts, particularly reductions in loss of life, and reduced pollution and congestion. Products associated with the cycling industry contribute £0.7b, while tourism attributable to cycling contributes, at least, a further £0.5b.* ***Cycling generates around 64,000 FTE jobs in the UK*** *including jobs in tourism, sales and repair, cycle delivery, manufacturing, and cycle infrastructure."*

TERRITORIAL SCOPE

Please note that the figures compiled for this report apply to the United Kingdom as a whole (including Northern Ireland), notwithstanding any report headings or titles which may refer to “Great Britain”.

GREAT BRITAIN

BICYCLE AND EPAC PRODUCTION
(x1,000 units) 2000 – 2019

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Production (x 1,000)	1.200	1.000	350	325	250	135	94	27	28	20
Evolution year/year-1 (%)		-16,67	-65,00	-7,14	-23,08	-46,00	-30,37	-71,28	3,70	-28,57

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Production (x 1,000)	23	40	40	50	52	53	83	90	117	137
Evolution year/year-1 (%)	15,00	73,91	0,00	25,00	4,00	0,96	58,10	8,67	29,50	17,64

GREAT BRITAIN

PARTS & ACCESSORIES PRODUCTION*
(M€) 2000 – 2019

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
P & A Production (M€)	15	15	15	11	12	12	15	15	17	17
Evolution year/year-1 (%)		0,00	0,00	-26,67	9,09	0,00	25,00	0,00	13,33	0,00

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
P & A Production (M€)	30	31	31	31	36	35	32	33	34	35
Evolution year/year-1 (%)	76,47	3,33	0,00	0,00	16,13	-2,78	-8,57	3,13	3,03	1,47

*Values excluding VAT

GREAT BRITAIN

BICYCLE AND EPAC SALES*
(x1,000 units) 2000 - 2019

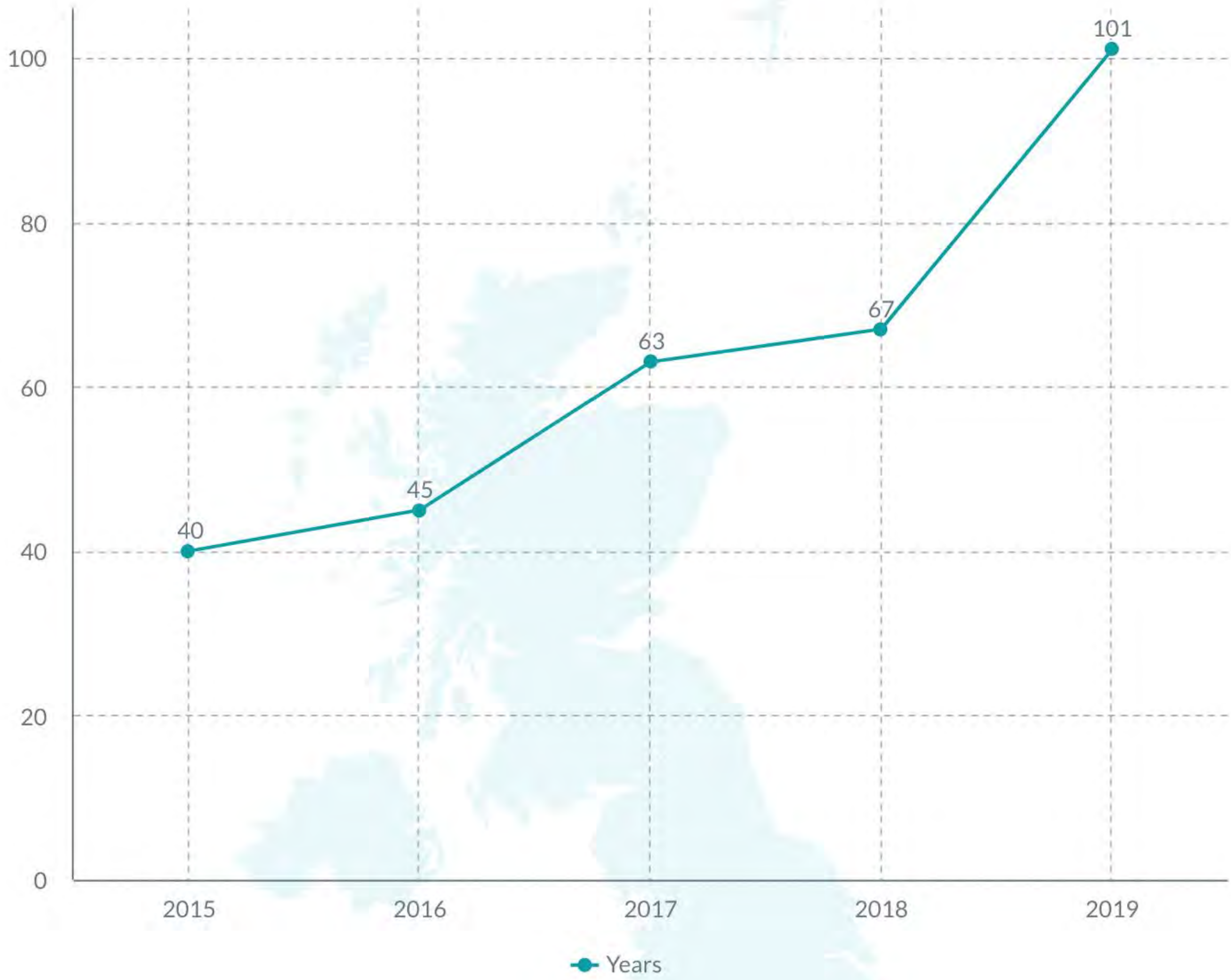
Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Sales (x 1,000)	2.300	2.400	2.300	3.727	3.905	3.800	3.920	3.771	3.311	3.400
Evolution year/year-1 (%)		4,35	-4,17	62,04	4,78	-2,69	3,16	-3,80	-12,20	2,69

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	3.640	3.580	3.600	3.350	3.630	3.514	3.098	3.102	2.471	2.613
Evolution year/year-1 (%)	7,06	-1,65	0,56	-6,94	8,36	-3,20	-11,84	0,12	-20,33	5,73

*Sales: Sales to consumers

GREAT BRITAIN

EPAC SALES*
(x1,000 units) 2015 - 2019



Year	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	40	45	63	67	101
Evolution year/year-1 (%)		12,50	38,99	7,60	50,61

*Sales: Sales to consumers

ITALY

Bicycles and e-bikes are synonymous of healthy and sustainable individual mobility and are an increasingly important component for modern mobility concepts in our cities. That's why the Italian government, regions and many municipalities are pursuing the goal of significantly increasing the percentage of cyclists.

Surveys and statistics show that bicycles and e-bikes in Italy are used not only for sporting or recreational purposes, but also for daily trips. To go to work, to school, for errands or as a link with rail and public transport in general thanks to the numerous secure parking spaces set up in the stations.

The popularity of e-bikes, in particular, is growing dynamically, now covering all market segments of traditional bikes. They allow longer distances and higher average speeds and open up new mobility options in cities and towns. A new way of pedaling.

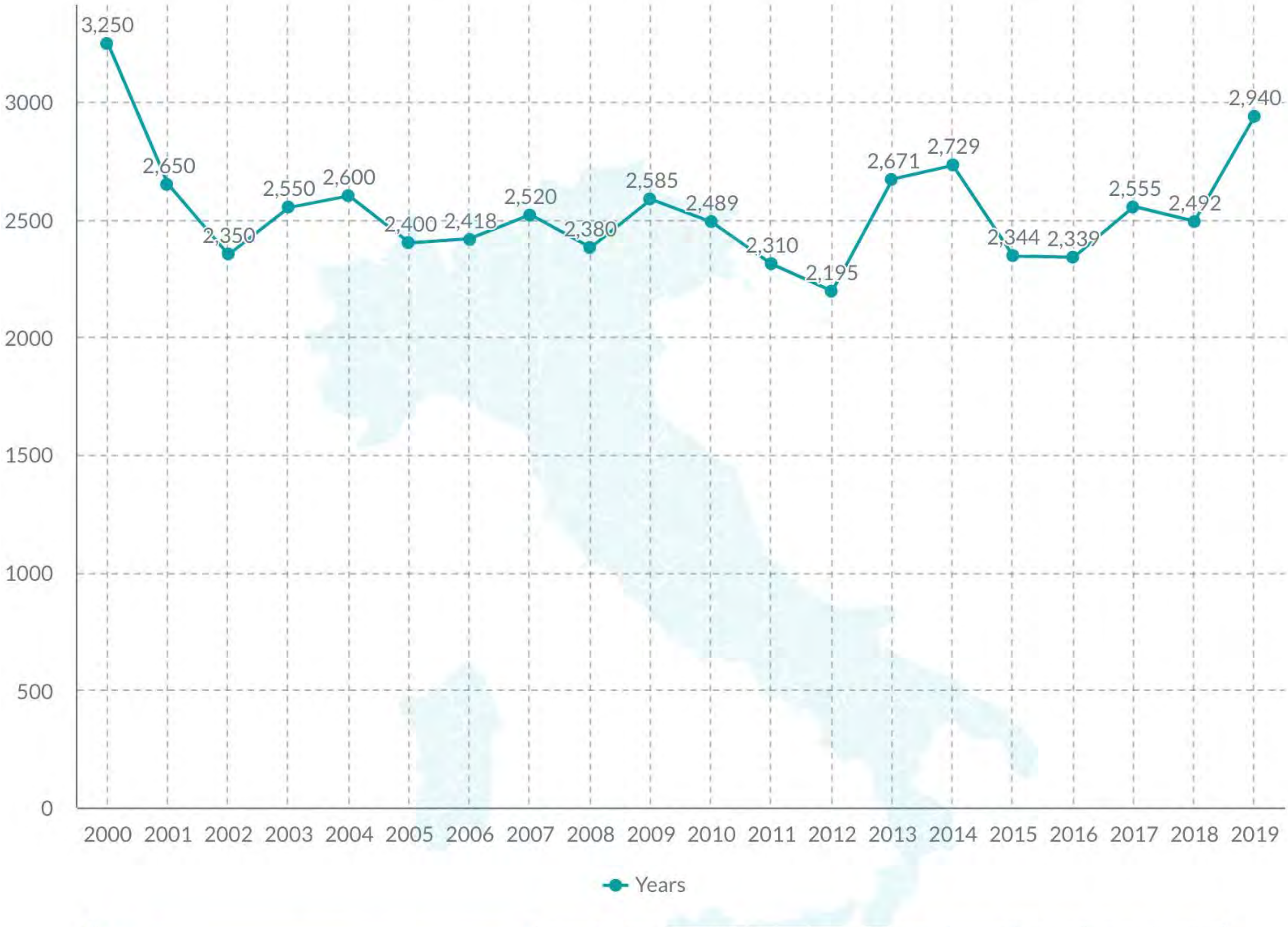
The sale (in pieces) of bicycles and e-bikes in 2019 was 1.713 million units, 7% more than the previous year while the sale of e-bikes grew by 13% from 173 to 195 thousand pieces sold. Unlike other years, traditional bicycles, especially city and trekking, are growing again in all areas of Italy. Production is growing again and consequently exports. The entire Italian market, for sale, is now worth around 1.35 billion euros.

The only negative signs are found in the import of electric pedal-assisted bicycles. They are the direct effect of the introduction of anti-dumping duties against unfair Asian competition, and gradually bring back production to Europe and in particular to Italy given its manufacturing tradition in the cycle sector.

There are many reasons to explain the increase in bicycle sales, but probably the main one lies in the awareness of a group of consumers. Technical and technological innovations, the high attractiveness of vehicles, but also the growing importance of bicycles and e-bikes for daily mobility and in particular the new political and social scenarios on climate change are elements that lead to more and more decisions people, changes in behavior and habits compared to the past.

ITALY

BICYCLE AND EPAC PRODUCTION
(x1,000 units) 2000 – 2019

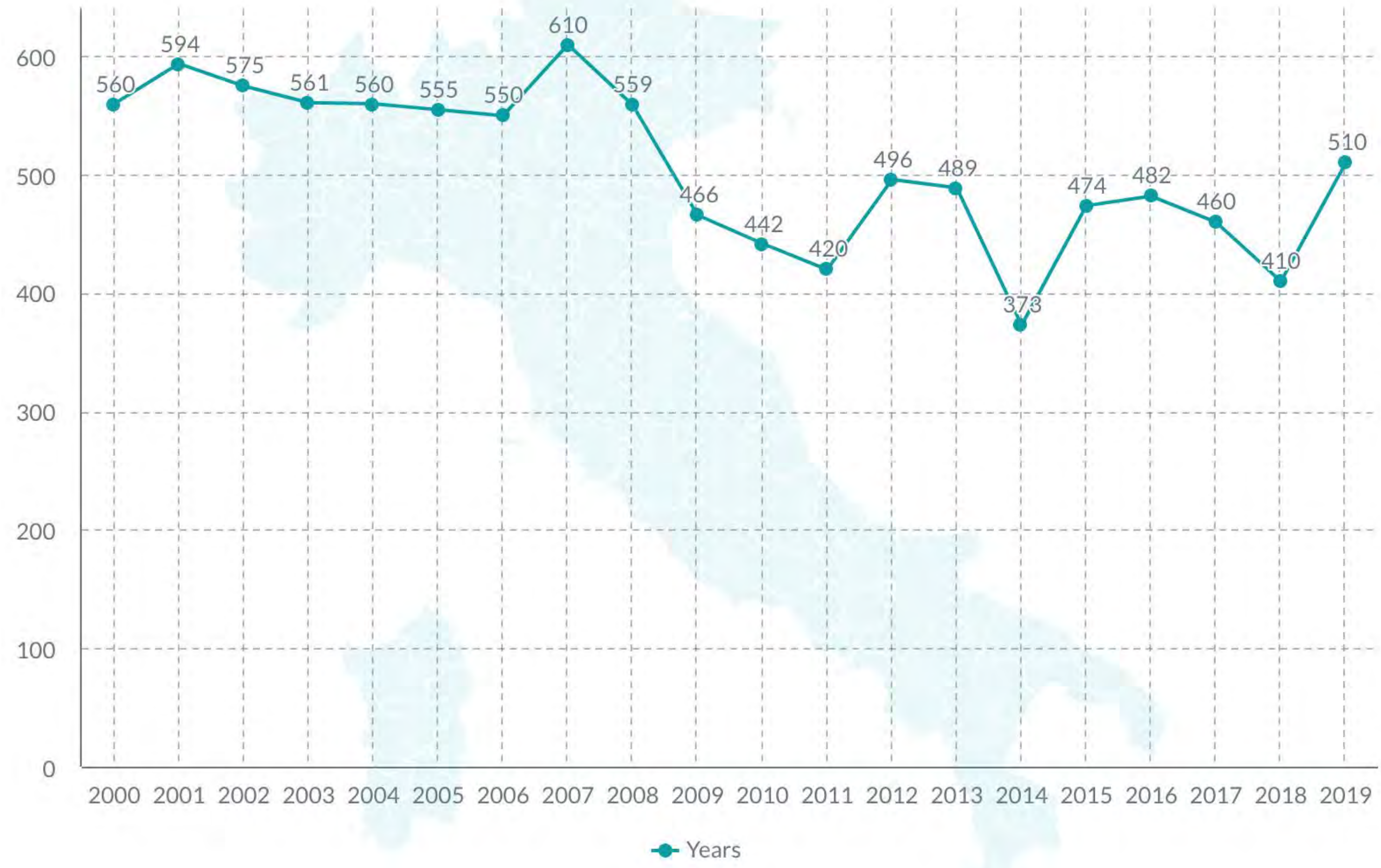


Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Production (x 1,000)	3.250	2.650	2.350	2.550	2.600	2.400	2.418	2.520	2.380	2.585
Evolution year/year-1 (%)		-18,46	-11,32	8,51	1,96	-7,69	0,75	4,22	-5,56	8,61

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Production (x 1,000)	2.489	2.310	2.195	2.671	2.729	2.344	2.339	2.555	2.492	2.940
Evolution year/year-1 (%)	-3,71	-7,19	-4,98	21,69	2,17	-14,11	-0,23	9,25	-2,47	17,98

ITALY

PARTS & ACCESSORIES PRODUCTION*
(M€) 2000 – 2019



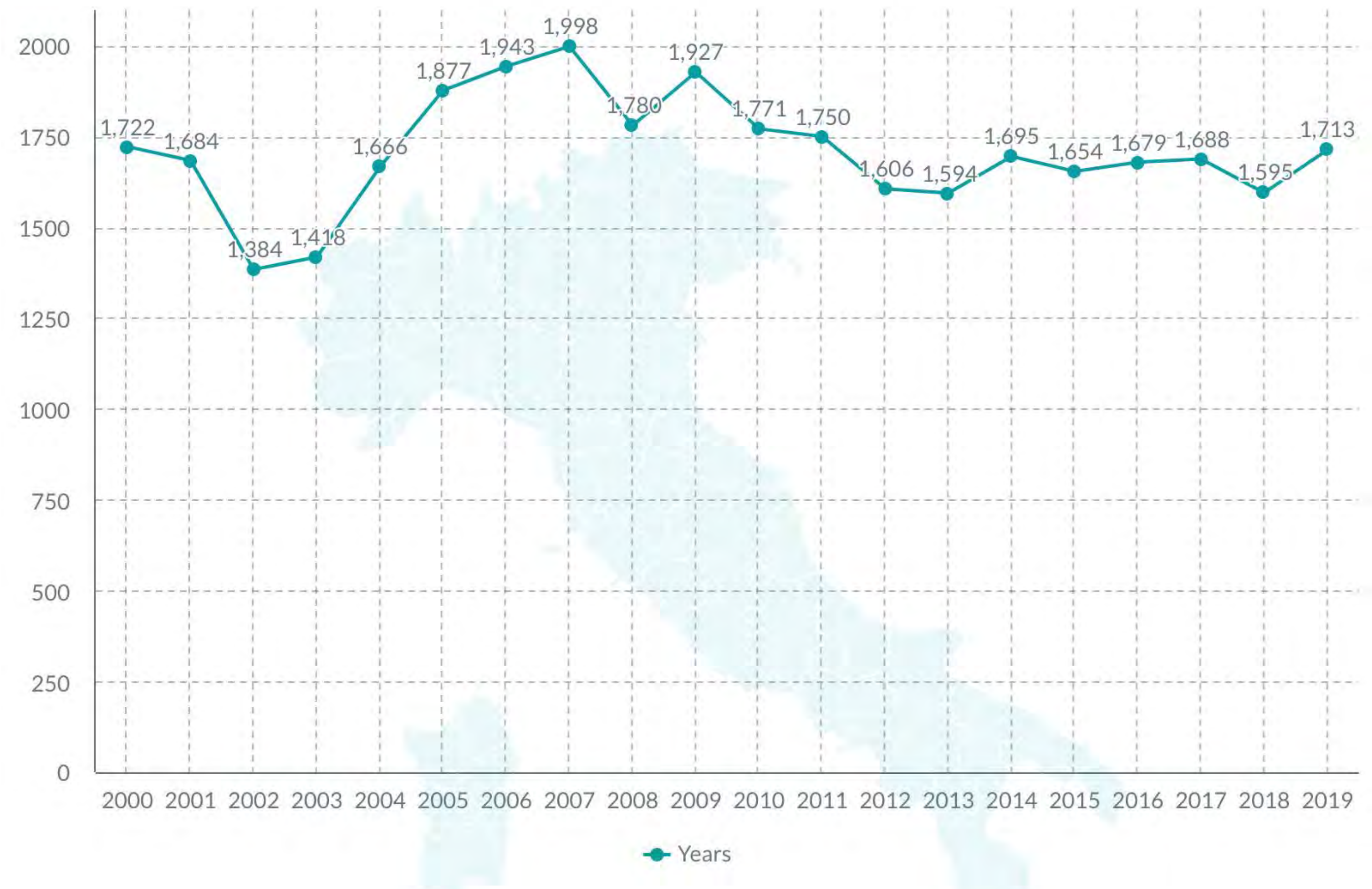
Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
P & A Production (M€)	560	594	575	561	560	555	550	610	559	466
Evolution year/year-1 (%)		6,07	-3,20	-2,43	-0,18	-0,89	-0,90	10,91	-8,36	-16,64

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
P & A Production (M€)	442	420	496	489	373	474	482	460	410	510
Evolution year/year-1 (%)	-5,15	-4,98	18,10	-1,41	-23,72	27,08	1,69	-4,56	-10,87	24,39

*Values excluding VAT

ITALY

BICYCLE AND EPAC SALES*
(x1,000 units) 2000 – 2019



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Sales (x 1,000)	1.722	1.684	1.384	1.418	1.666	1.877	1.943	1.998	1.780	1.927
Evolution year/year-1 (%)		-2,21	-17,81	2,46	17,49	12,67	3,52	2,83	-10,91	8,26

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	1.771	1.750	1.606	1.594	1.695	1.654	1.679	1.688	1.595	1.713
Evolution year/year-1 (%)	-8,10	-1,19	-8,23	-0,75	6,34	-2,44	1,55	0,51	-5,51	7,40

*Sales: Sales to consumers

ITALY

EPAC SALES*
(x1,000 units) 2012 – 2019

Year	2012	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	46	51	51	56	124	149	173	195
Evolution year/year-1 (%)		10,87	0,00	10,17	121,40	19,77	16,11	12,72

*Sales: Sales to consumers, including Speed EPAC sales

THE NETHERLANDS

Electric bicycle sales continues to grow

In 2019, a record number of 420,000 new e-bikes were sold in the Netherlands, which is 2.6 percent more than in 2018. The total turnover from the sales of new bicycles rose for the 7th year in 2019, to a new record of 1.252 billion euros. Almost 70 percent of the total market turnover is now generated by the sale of electric bicycles. This is shown by figures from RAI Association.

After a strong growth of almost 6 percent in 2018 compared to 2017, bicycle sales stabilized in 2019. With 1,007,000 units, more than a million new bicycles were sold for the second time in a row last year. In 2018 there were 1,011,000*. Consumers spent an average of 1,243 euros on a new bicycle; the highest amount ever and slightly more than the 1,207 euros in 2018. This is mainly due to the continued success of the electric bicycle.

E-bike is the standard

Last year, 420,000 e-bikes were sold, which constitutes for a total turnover of 868 million euros. This is more than double compared to 2014 when 414 million euro turnover from the sale of e-bikes was achieved. On average, consumers spent 2,067€ on an e-bike last year. The electric bicycle is the best-selling type of bicycle in the Netherlands for the second year in a row with a 41.7 percent market share. The city bike follows at a distance with 32.9 percent and in third place is the children's bike with a market share of 10.9 percent.

Specialist trade remains a favorite

RAI Association sees that consumers still purchase the most bicycles from specialist retailers. As in 2018, approximately 75 percent of all bicycles will eventually be purchased from a specialist retailer. Consumers therefore opt for the service and security of a specialist. Moreover, the dividing line between online and offline bicycle sales is getting thinner. Consumers often orient themselves and obtain information online, but ultimately buy the bicycle from specialist retailers.

Traditional Internet providers respond to this by also offering physical sales and service points. Conversely, the traditional retail trade is increasingly active online to position itself more strongly in the market.

* excluding Speed EPAC sales

THE NETHERLANDS

Lease bicycle arrangement

On January 1st of this year, the tax rules for the company bicycle were simplified and an additional tax of 7 percent applies to a business bicycle that is also used privately. Various lease bicycle providers have responded to this and offer a wide variety of lease bicycle products. RAI Association expects this to have a positive effect on the sale of new bicycles in 2020. This is not only good for the market, but above all good for traffic jams, emissions of harmful emissions and CO2 and positive for the health of employees.

THE NETHERLANDS

BICYCLE AND EPAC SALES*
(x1,000 units) 2000 – 2019

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bicycle and EPAC Sales (x 1,000)	1.517	1.365	1.324	1.324	1.250	1.239	1.323	1.400	1.388	1.281
Evolution year/year-1 (%)		-10,02	-3,00	0,00	-5,59	-0,88	6,78	5,82	-0,86	-7,71

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	1.213	1.171	1.035	1.008	1.051	988	931	961	1.014	1.011
Evolution year/year-1 (%)	-5,31	-3,46	-11,61	-2,61	4,27	-6,00	-5,76	3,27	5,49	-0,30

*Sales: Sales to consumers

THE NETHERLANDS

EPAC SALES*
(x1,000 units) 2010 – 2019

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	171	178	175	192	223	276	273	301	412	424
Evolution year/year-1 (%)		4,09	-1,69	9,71	16,15	23,68	-1,16	10,48	36,80	2,88

*Sales: Sales to consumers, including Speed EPAC sales

SPAIN

Spanish Bicycle market was already growing during 2019

Bicycles sales grew 20.41% in units and the total market revenues grew by 9.27% due to the increase of mountain (16.3%) and children bikes (45.3%). E-bikes were still growing by 28.3%.

The Spanish bicycle market has grown in a huge manner as soon as retailers could open their doors after the COVID-19 lockdown on May 4th. In Spain retailers were forced to close their businesses because they were not declared as essential services like in many other European countries.

All enquired retailers declare they are selling 3 or 4 times more entry level bicycles after the lockdown and all stocks of these entry level bicycles have been sold in all market channels, including market places, multi-sport chains and hypermarkets and of course specialty bicycle retailers.

But indeed, what the 2019 market profile shows is that Spain was already growing before the pandemic, centered on mountain bicycles, children bicycles and e-bikes.

Mountain bicycles growing again

In 2018, these kind of bicycles sales decreased by 16.3% maybe because of the change from regular mountain bicycles to e-mountain bikes but in 2019 the more important Spanish segment grew again up to 475,663 units which means 37.7% of the entire units sold. Nevertheless, the average price of these bikes decreased almost 5% to 699 Euros.

A worrisome trend in urban bikes

After years and years of growth in the urban segment, 2019 reveals a worrisome trend for cycling commuting. The urban units sold decreased by 24.2% meanwhile the average price grew by 15.2% up to 298 Euros. Hopefully this negative trend has been remedied post-Covid.

Children bikes regain sales volume and market share

After a 2018 worrisome sales year in the children's segment with a loss of 15.51% these bicycles regain market share up to 37.9% of the entire market and are climbing again up to the first bicycle category place.

SPAIN

E-bikes grew less than previous years

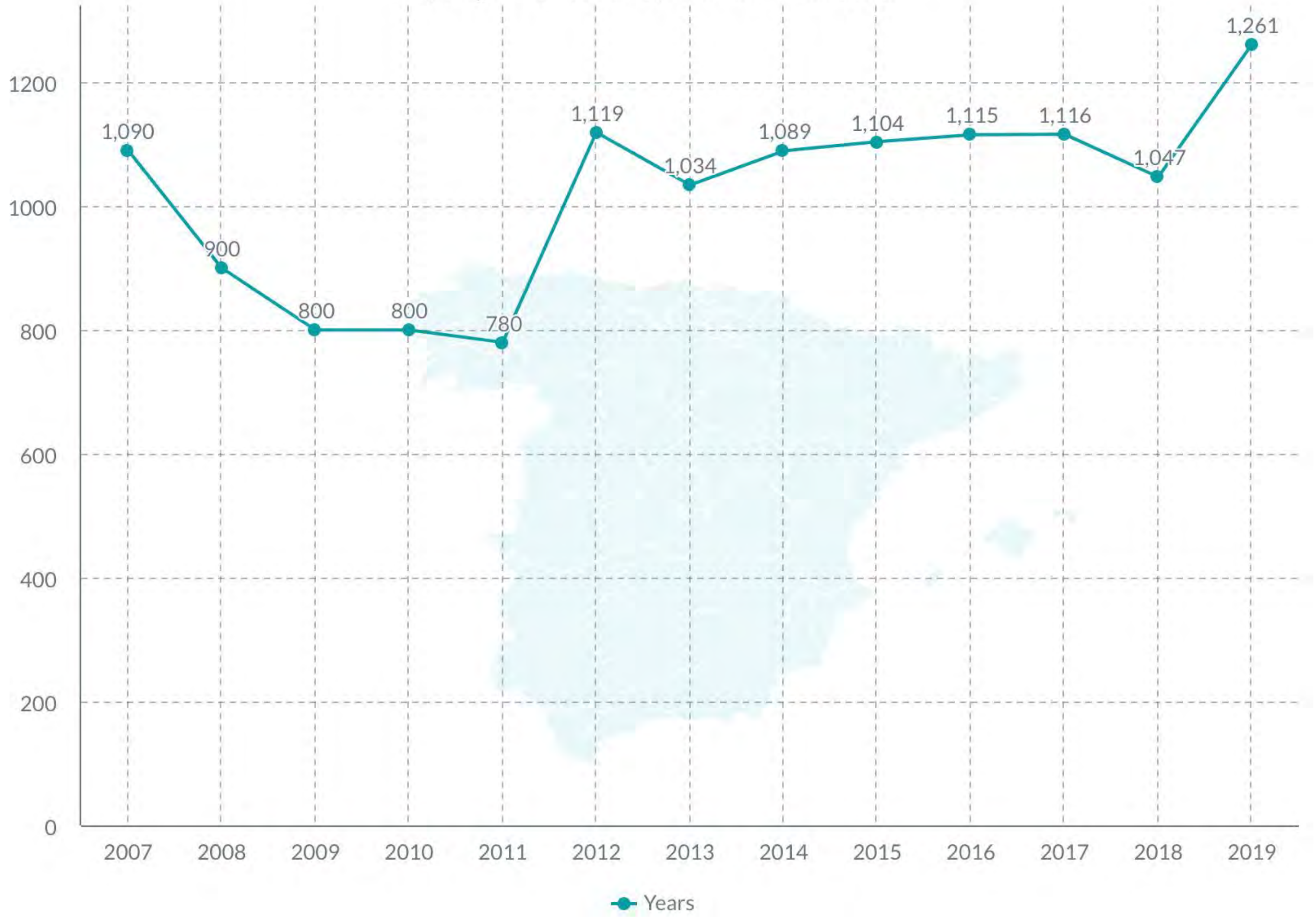
The previous year's e-bike sales used to grow more than 50% each year. During 2019 e-bike sales were still growing but just by 28.3% reaching 142,766 units and a market share of 11.3%.

Retail trends still the same

On one hand, the closing of unprofitable specialty shops caused the loss of 2.16% of retailers. On the other hand, multi-sport chains gained an additional 0.74% market share up to 11.87%, meanwhile Hypermarkets remain stable with 8.02% of market share.

SPAIN

BICYCLE AND EPAC SALES*
(x1,000 units) 2007 – 2018

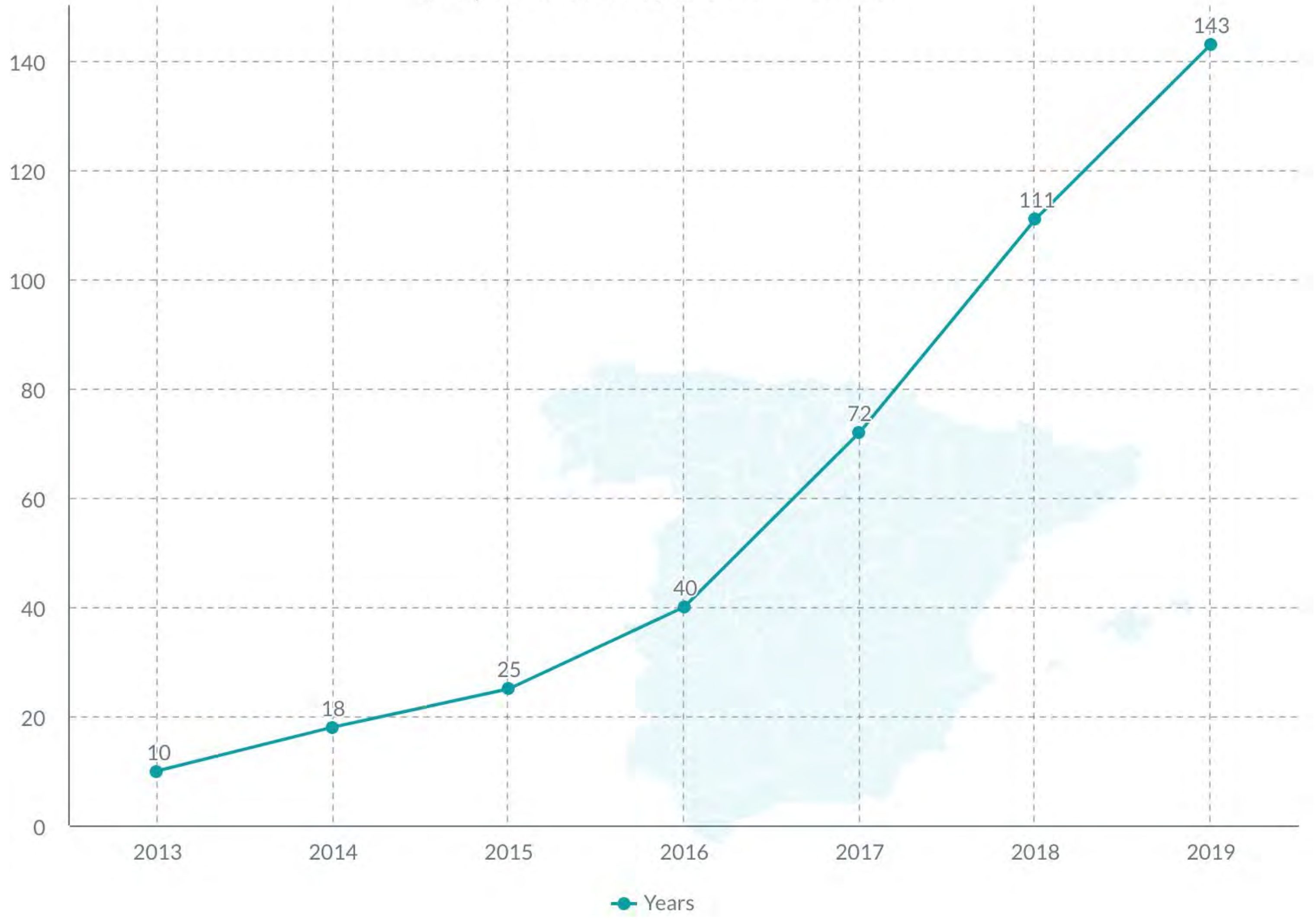


Year	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bicycle and EPAC Sales (x 1,000)	1.090	900	800	800	780	1.119	1.034	1.089	1.104	1.115	1.116	1.047	1.261
Evolution year/year-1 (%)		-17,43	-11,11	0,00	-2,50	43,46	-7,60	5,32	1,36	1,01	0,09	-6,14	20,41

*Sales: Sales to consumers

SPAIN

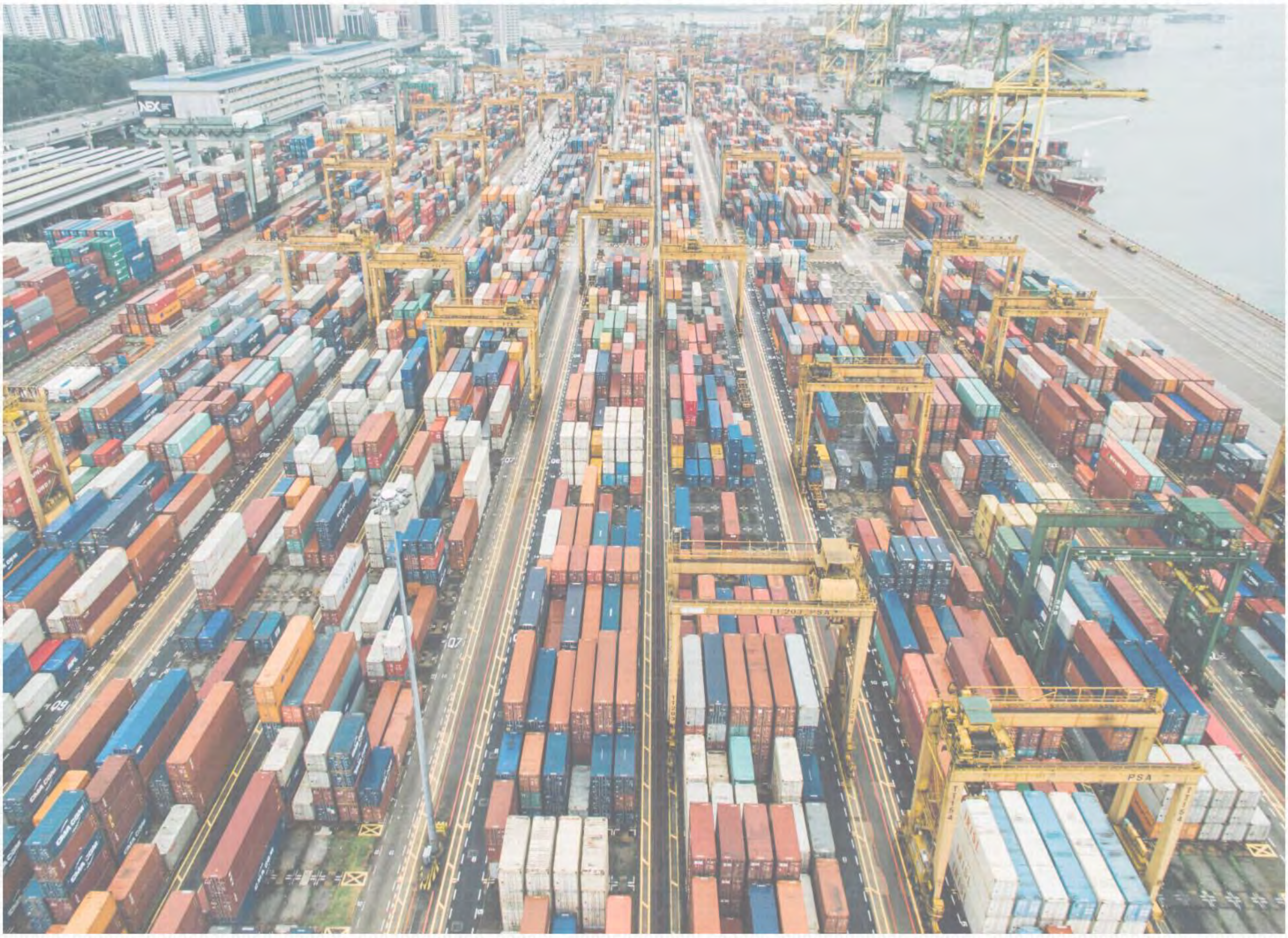
EPAC SALES*
(x1,000 units) 2013 – 2018



Year	2013	2014	2015	2016	2017	2018	2019
EPAC Sales (x 1,000)	10	18	25	40	72	111	143
Evolution year/year-1 (%)		80,00	36,69	63,66	78,80	54,58	28,27

*Sales: Sales to consumers

IMPORTS BICYCLES AND EPACS TO EU28 2014-2019

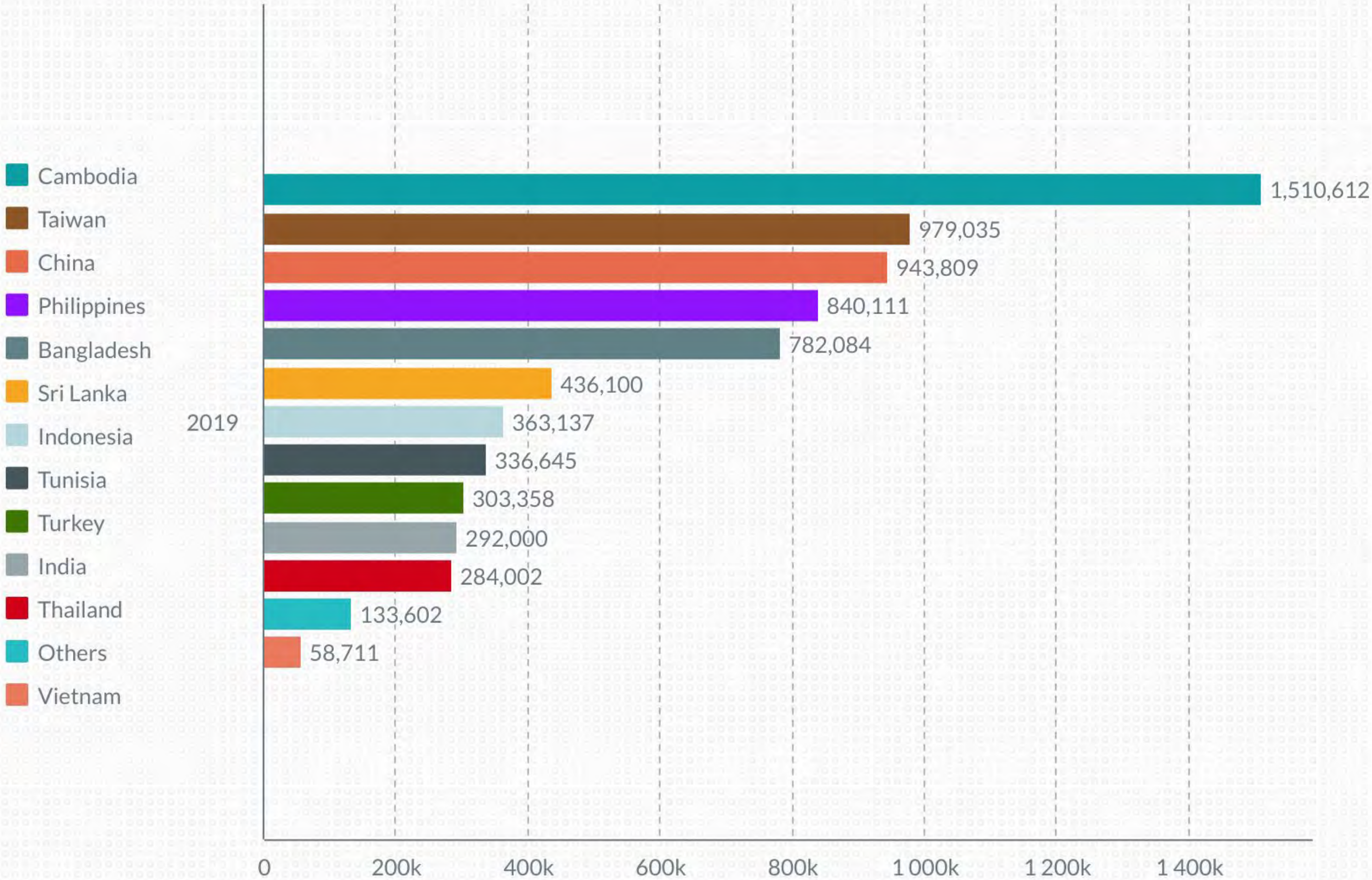


BICYCLE IMPORTS TO EU28
2014-2019

	TOTAL
2014	7.880.551
2015	7.824.237
2016	6.987.097
2017	7.173.133
2018	6.692.993
2019	7.263.206

Source: Eurostat, code 87120030 and code 87120070
Bicycles imported from all countries exporting bicycles to the EU

BICYCLE IMPORTS TO EU28
BY COUNTRY OF ORIGIN
2014 – 2019



	Cambodia	Taiwan	China	Philippines	Bangladesh	Sri Lanka	Indonesia
2014	1.213.478	1.935.896	518.662	914.961	668.508	397.975	171.717
2015	1.387.435	1.977.789	623.744	860.523	747.881	383.506	164.696
2016	1.316.421	1.656.670	490.718	684.210	734.400	327.966	213.153
2017	1.416.640	1.509.324	715.219	835.862	816.149	285.774	183.168
2018	1.518.518	1.030.656	830.227	743.504	708.831	288.633	218.953
2019	1.510.612	979.035	943.809	840.111	782.084	436.100	363.137

	Tunisia	Turkey	India	Thailand	Vietnam	Others	TOTAL
2014	426.975	350.636	204.182	691.763	120.843	264.955	7.880.551
2015	427.862	349.986	201.141	471.669	99.513	128.492	7.824.237
2016	431.543	265.607	288.147	419.216	86.837	72.209	6.987.097
2017	401.003	180.641	309.686	341.605	75.634	102.428	7.173.133
2018	320.803	237.676	259.710	310.340	99.530	125.612	6.692.993
2019	336.645	303.358	292.000	284.002	58.711	133.602	7.263.206

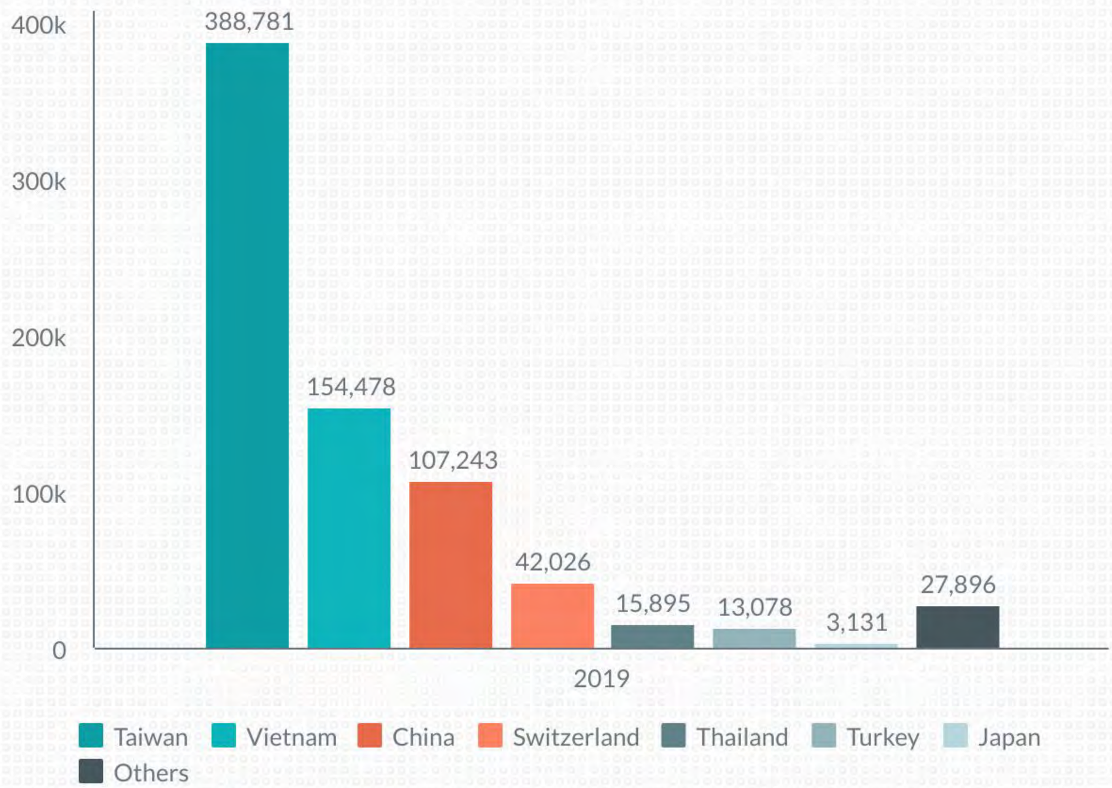
Source: Eurostat, code 87120030 and code 87120070

EPAC IMPORTS INTO EU28
2014 – 2019

	TOTAL
2014	296.237
2015	447.599
2016	636.512
2017	988.398
2018	1.086.241
2019	752.528

Source: Eurostat, code 87119010 for Vietnam, Taiwan, Japan and Switzerland for 2014-2016, Chinese export data for PRC 2014-2016, Eurostat code 87116010 for 2017-2019
EPACs imported from all countries exporting EPACs to the EU

EPAC IMPORTS INTO EU28*
BY COUNTRY OF ORIGIN
2014-2019



	Taiwan	Vietnam	China	Switzerland	Thailand	Turkey	Japan	Others	TOTAL
2014	21.335	37.892	219.133	883	no data	no data	16.994	no data	296.237
2015	43.095	74.259	311.718	14.310	no data	no data	4.217	no data	447.599
2016	79.312	91.468	433.642	30.477	no data	no data	1.613	no data	636.512
2017	126.130	105.742	718.004	26.516	7.358	312	1.136	3.200	988.398
2018	215.766	152.803	659.807	37.256	11.454	2.452	217	6.486	1.086.241
2019	388.781	154.478	107.243	42.026	15.895	13.078	3.131	27.896	752.528

Source: Eurostat, code 87119010 for Vietnam, Taiwan, Japan and Switzerland for 2014-2016, except Chinese export data for PRC 2014-2016, Eurostat code 87116010 for 2017-2019

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EUROPEAN BICYCLE INDUSTRY AND MARKET PROFILE

Thank you note

We wish to warmly thank our member associations for their support and cooperation throughout the process of gathering all the information and for providing market specific summaries with useful insights in their market realities.

Furthermore, we would like to thank the various industry representatives in markets where there is no member association; without that support we would not have been able to cover those markets.

Last but not least, this year our deepest thoughts heartily go to Siegfried Neuberger, for a long time General Manager of the German association ZIV (Zweirad Industrie Verband), Chairman of European and International Standardisation Committees and a wonderful colleague in the several CONEBI Working Groups. Mr. Neuberger sadly passed away on June 13 2020 but he will always be with us: he was an extremely important professional and friend for the whole global Bicycle Industry. Thank you very much Siegfried, we will never forget you.

CONEBI
(Confederation of the European Bicycle Industry)