

BLOCKING NOTICE: Wednesday, 16. March 2022, 12:30 pm

ZIV – Market Figures and Development 2021

"Freedom mobility" remains in high demand

The Russian war against Ukraine causes energy shortage and rising mobility costs - and that will motivate many people to use their bikes more often. Already in 2021, the bicycle industry showed with its products how fun, benefits, new jobs and independence can be combined. Despite all the challenges, 2021 was also a great success for the German bicycle industry.

The initial situation for 2021 was extremely critical. From the beginning, it was foreseeable that it would not be an easy year: pandemic-related plant closures, massively disrupted supply chains and delivery difficulties caused serious problems that jeopardized the success of the industry. Nevertheless, the manufacturers were able to increase their production by 10 percent in such a year. This success was not least the result of reshoring effects that can already be observed today. The industry could have achieved an even better result if urgently needed parts had been constantly available.

More production, higher inventory

The figures in detail: Domestic German production was 2.37 million bicycles. Last year (2021), 1.43 million EPACs (an increase of 8 percent) and 0.94 million bicycles (an increase of 13.2 percent) were manufactured in Germany. The value of bicycles rose to 6.56 billion euros.

In addition, 4.14 million bicycles and EPACs were imported to Germany. This represents an increase of 11 percent compared to the previous year. Exports remained virtually unchanged at 1.56 million units.

Total domestic deliveries, i.e. the sum of production and imports less exports, rose by 14 percent to 4.94 million bicycles (previous year: 4.32 million). Considering the replenishment of stocks, this results in a domestic delivery of 4.7 million bicycles (previous year: 4.97 million). The difference of around 240,000 bicycles and EPACs is reflected in a change in inventory. More bicycles were produced than sold towards the end of the year. It also means that interested buyers will have a wider range of products at the beginning of the upcoming 2022 season.

Sales figures

After the record year 2020, the year 2021 was also a success. The number of EPACs sold has risen from 1.95 to 2 million. At the same time, the number of bicycles purchased has fallen from 3.09 to 2.7 million units, so that the number of units sold has fallen from 5.04 million to 4.7 million. However, it is still well above the pre-corona level. "We have jumped to a new level," explains ZIV Managing Director Burkhard Stork. Better availability of goods would also have led to higher sales figures here. This limited delivery capacity and the widespread perception that bicycles are sold out have prevented an even better performance.

Bicycle stock

The bicycle confirms its importance for the population as an important means of transport and leisure activity. Overall, the bicycle stock in Germany now stands at 81 million. At least statistically, almost every German citizen now has a bicycle. It is and remains the means of transport with the most vehicles in the fleet. The 8.5 million EPACs now available make the electric bicycle an important option in commuting and leisure time. The EPAC fleet is 25 times higher than the e-car fleet. "The bicycle industry has made Germany the leading market for electromobility," says Burkhard Stork, "without any subsidies." In view of the much more intensive use of EPACs compared to non-motorized bicycles, there is an urgent need for action today to quickly follow suit with the available infrastructure.

Prices and distribution channels

Online retail is booming everywhere – except in the bicycle industry. Last year, most bicycles were sold in stationary specialist retailers. It was able to significantly increase its market share to 73 percent, while 20 percent of the volume was sold via online sales channels. The consulting-intensive product bicycle, especially with electric drive, clearly remains a domain of the expert bicycle trade.

The average selling price of the bicycles was 1.395 euros. Within a decade, this figure has almost tripled. This increase is mainly explained by the steadily growing market share of EPACs, which now stands at 43 percent. This will continue to rise in the foreseeable future in the coming years.

Outlook, challenges and perspectives

The positive development of the German bicycle industry in recent years and its effect as a job engine in the domestic economy is endangered by the existing shortage of workers. This situation will continue to deteriorate in the foreseeable future. Therefore, the ZIV expects reasonable, modern training opportunities that also make it easier for lateral entrants to switch to the bicycle industry as well as a sensible immigration policy. Only these conditions enable further production increases and continued reshoring to Germany. In principle, the Zweirad-Industrie-Verband expects high demand for the coming years. The opportunities that result from this for a successful mobility transition must be vigorously exploited and promoted.

The Zweirad-Industrie-Verband e.V. (ZIV)

90% of the bicycles and EPACs produced in Germany in 2021 come from ZIV member companies. The Zweirad-Industrie-Verband e. V. (ZIV) is the national representation of the interests of the German and international bicycle industry. These include manufacturers and importers of bicycles, EPACs, bicycle components and accessories. As an industry association, it represents around 100 member companies vis-à-vis legislators, government, authorities, the media, institutions and organizations.

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