

Bicycle and e-bike market in the first months of 2023: ZIV reports positive figures overall; buying restraint and bad weather cloud the balance sheet

Berlin, 15.06.2023. In the run-up to the world's leading bicycle trade fair Eurobike, the ZIV Zweirad-Industrie-Verband (Bicycle Industry Association) has presented market data for the German bicycle industry for the first five months of 2023. Foreign trade has developed positively, with both declines and increases in sales and production. In addition, with the change in weather in May, retail sales have now picked up tremendously.

Export / import (1st quarter 2023)

In the first quarter of 2023, 260,000 bicycles were exported, 14% more than in the same period in 2022. The export rate for e-bikes is particularly encouraging: 190,000 units were exported, 56% more than in the same period last year. With a total of 28% growth compared to the first quarter of 2022, customers outside Germany represent a reliable and growing sales market for German bicycle and parts production. The majority of exports from German bicycle and e-bike production go to EU and EFTA countries (share in 2022 98% for e-bikes and 93% for bicycles).

Imports in the first quarter totalled 680,000 bicycles and 350,000 e-bikes. This is an increase of 2.3% and 12.7% respectively compared to the same period last year. Overall, imports in the first quarter grew by 5.6% year on year.

Production (January to May 2023)

The ZIV sees the production of e-bikes in the first five months at 1,050,000 and thus about 5% higher than in 2022. The production of bicycles in the same period was 450,000 and thus about 10–15% below the previous year's figure.

Sales in Germany

The current circumstances and the bad weather led to significantly weaker sales figures up until mid-May than during the same period in the previous year. For the first five months of 2023, the ZIV is forecasting sales of e-bikes to be 850,000 units and thus down 12% on the strong previous year. Meanwhile, for bicycles the figure is 830,000 units and down 20% on the first five months of the previous year.

With the change in weather, sales increased massively from mid-May. June has also been very strong so far.

"In view of the ongoing war in Europe, with inflation, a general reluctance to buy and very bad weather, we expected the market to be gloomy in the first few months of 2023," says Burkhard Stork, CEO of ZIV. "It is therefore all the more pleasing that the anticipated decline in bicycle sales, and especially e-bikes, was less severe throughout Germany from January to May compared to the strong results in the same period last year, and that exports were able to increase considerably in the first quarter."

Full-year outlook: very heterogeneous

Rarely has an outlook for the full year been as difficult as for the current year.

"We confer closely with the companies and are currently seeing very heterogeneous situations, sales figures and expectations," says Burkhard Stork. "There is a general consensus that quality and innovation 'Made in Germany' will remain a stable strong driver, especially in the e-bike market, and that the bicycle and e-bike market will develop very well in the medium and long term," emphasises Stork. Nevertheless, the current year will probably remain challenging for the bicycle industry.

The ZIV forecasts sales of around 2 million e-bikes for 2023. That would be about 10% less than in the peak year 2022 with 2.2 million units. A look into the more distant future shows very good prospects for the bicycle industry, whereby two challenges must be overcome:

Staff shortages

The German bicycle industry, as well as industry as a whole, has performed excellently in recent years. The production of e-bikes has increased by 70% since 2019 and sales have nearly doubled from 4 billion euros in 2019 to 7.36 billion euros in 2022. This development is now expected to pick up speed again. It is already foreseeable that this will greatly exacerbate the problem of staff recruitment.

Burkhard Stork, CEO ZIV: *" Our member companies already made it clear before the Covid-19 pandemic that the shortage of skilled workers is a major problem. This problem has since become far more acute. Companies in the bicycle industry unanimously report significant difficulties across all qualification levels in recruiting staff. As an association, we organise the joint efforts of the industry. We expect policymakers to support us and to take appropriate countermeasures."*

Political support

The 2020 federal budget marked the start of Germany's biggest ever bike path construction offensive. Federal Transport Minister Wissing has secured the necessary funds until 2028. The ZIV expressly warns against making cuts to this in the budget negotiations that are currently underway. At the same time, the coalition agreement promises urgently needed changes in German road traffic legislation.

Burkhard Stork, CEO ZIV: *"The federal government's bike path offensive needs to remain reliable. Thousands of municipalities in Germany are working hard to build bike paths and develop their bike path networks. These processes cannot be completed overnight. Hence municipalities need reliability and a clear commitment that the projects being tackled now can also be financed in a few years' time. Investments in cycling have high benefits and are comparatively cheap – so it would be counterproductive to now cut back on these investments."*

About the ZIV Bicycle Industry Association

The Zweirad-Industrie-Verband e. V. (ZIV) is the national representation of the interests of the German and international bicycle industry – including import and wholesale as well as established companies and start-ups from the entire bicycle ecosystem. As an industry association, the ZIV brings together and represents the interests of around 120 member companies vis-à-vis legislators in the EU and Germany, the government, authorities, media, institutions and organisations. 90% of the bicycles and e-bikes produced in Germany in 2022 came from ZIV member companies.

ZIV active for you: Events and dates at Eurobike 2023

The ZIV is present during the Eurobike with a booth (Hall 8 / J07) and various events and tours as organiser or co-organiser.

When	What	Where	Who
Tuesday, 20.06.23			
13:15–15:00	Trade fair tour, among others with: Oliver Luksic Parliamentary State Secretary in the Federal Ministry for Digital and Transport Tarek Al-Wazir Deputy Hessian Minister President Mike Josef Lord Mayor of Frankfurt a. M.	Trade fair site	Eurobike, Messe Frankfurt, ZIV
Wednesday, 21.06.23			
17:30–19:00	Bike Nature Movement – booth reception	ZIV booth, Hall 8 / J07	DIMB, MTF, ZIV
Thursday, 22.06.23			
11:00–13:00	Trade fair tour with political stakeholders	Trade fair site	Eurobike, ZIV
14:00–15:30	A changing industry: unlocking Europe's potential as a business and production location for the bicycle industry	Future Mobility Forum, Hall 8 / Pink Stage	CONEBI, ZIV
17:30–19:00	Get-together: The political work of the bicycle associations – what moves us and what we move!	Eurobike Career Centre, Hall 12 / B 28 West Foyer	ADFC, VSF, ZF, ZIV
Friday, 23.06.23			
10:00–13:00	The Big Sustainability Event at Eurobike 2023 – incl. presentation of the industry guide for the bicycle industry	Future Mobility Forum, Hall 8 / Yellow Stage	Bikebrainpool, CIE, CONEBI, VSF, ZF, ZIV
11:30–12:30	Interoperable charging plugs for e-bikes (CHAdeMO) – status update	Hall 8.1. / Room Symmetrie 3	CHAdeMO, ZIV
13:00–13:45	GRS – ZIV industry solution Battery recycling for e-bikes	Hall 8.1. / Room Symmetrie 3	GRS, ZIV
14:00–15:30	Q&A on the German Sustainability Codex guide for the bicycle industry	Hall 8.1. / Room Symmetrie 3	VSF, ZF, ZIV
15:00–17:00	Trade fair tour with political stakeholders	Trade fair site	Eurobike, ZIV

More information at www.ziv-zweirad.de

ZIV press contact during the Eurobike:
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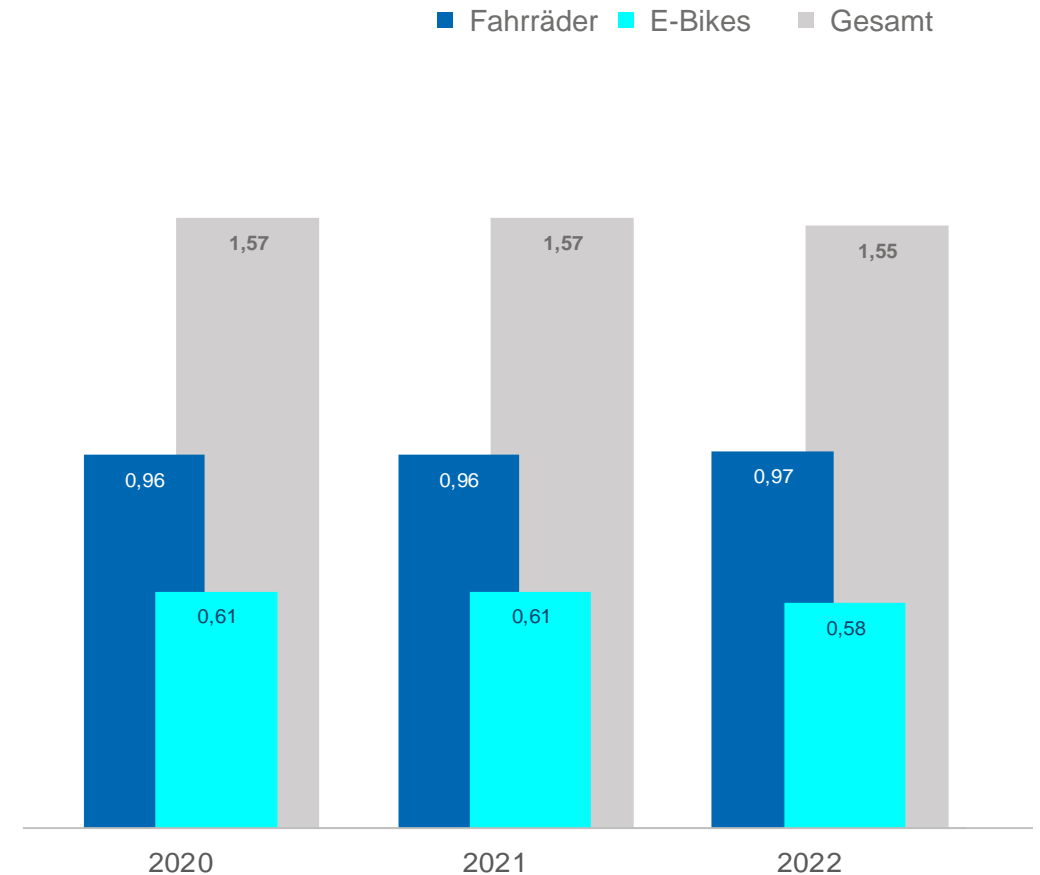
ZIV Zweirad-Industrie-Verband Fahrrad- und E-Bike Markt in den ersten Monaten 2023

EUROBIKE Pressekonferenz | 15. Juni 2023

Exporte Fahrräder und E-Bikes aus Deutschland (in Mio. Stück)

Deutliche Zuwächse bei den Exporten

- Die Zahl der exportierten Fahrräder im ersten Quartal 2023 liegt mit 260.000 um 14 % über dem Vorjahr
- Die Zahl der exportierten E-Bikes ist mit 190.000 um rund 56 % deutlich angestiegen
- Insgesamt ergibt sich damit ein Anstieg in den ersten drei Monaten des Jahres auf rund 450.000 Fahrzeuge, was einer Steigerung von 28 % entspricht
- Hier zeigt sich: Die produzierenden Unternehmen arbeiten ihre Aufträge ab.

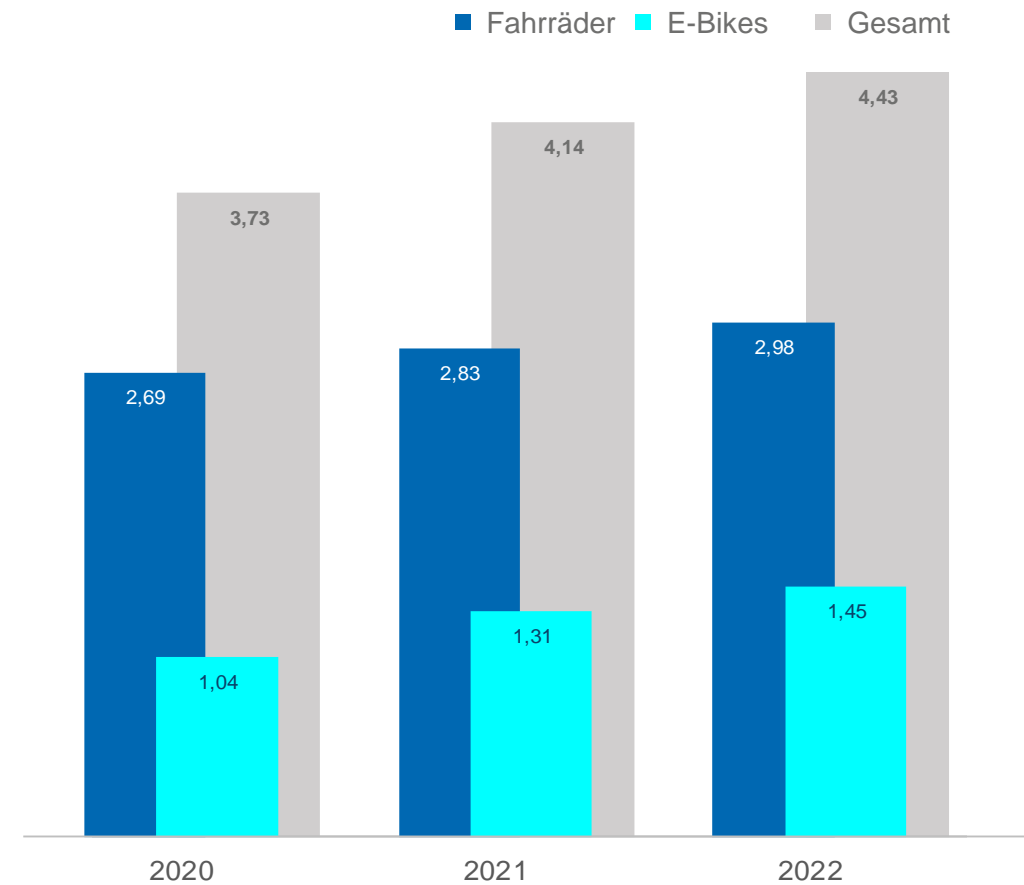


Quelle: StBA

Importe Fahrräder und E-Bikes nach Deutschland (in Mio. Stück)

Importe im ersten Quartal 2023 über Vorjahr

- Über 1 Mio. Fahrräder und E-Bikes wurden im Berichtszeitraum nach Deutschland eingeführt (+ 5,6 %)

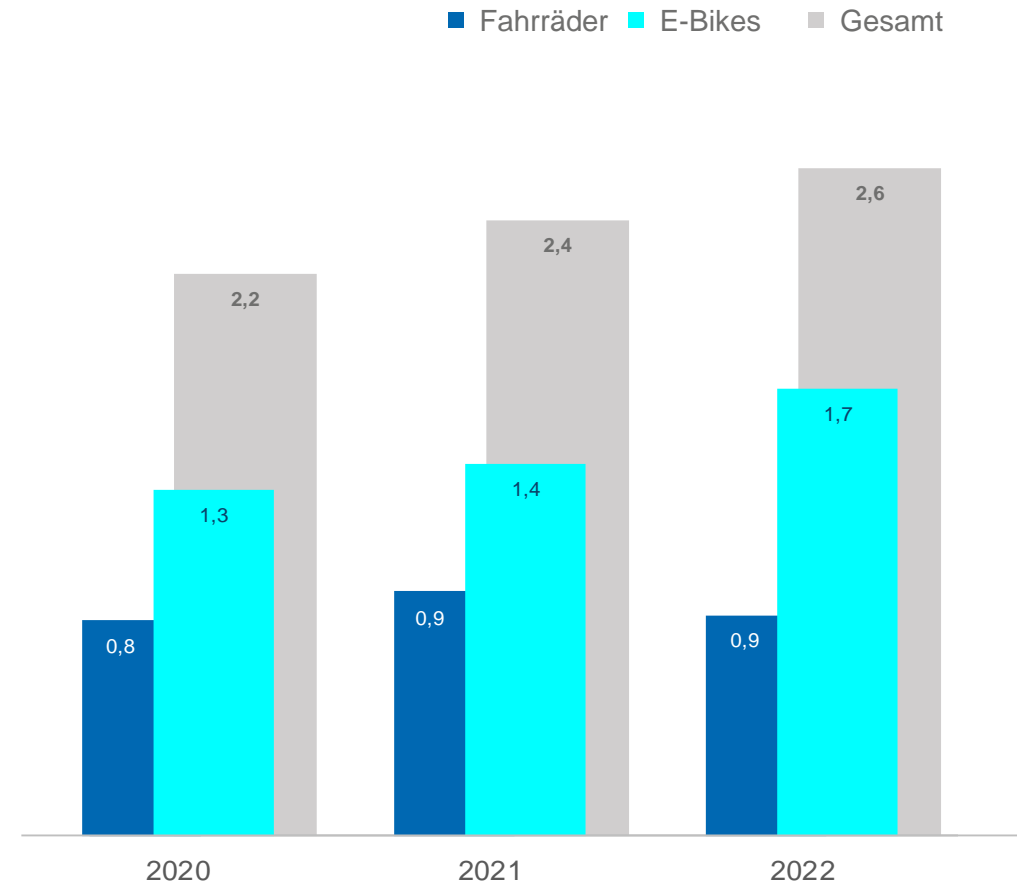


Quelle: StBA

Produktion Fahrräder und E-Bikes in Deutschland (in Mio. Stück)

Produktion bis Mai 2023

- Gesamtproduktion: 1,5 Mio. Fahrzeuge
→ **auf Vorjahresniveau**
- E-Bike-Produktion: 1,05 Mio. Fahrzeuge
→ **plus 5%**
- Fahrradproduktion: 450.000 Fahrzeuge
→ **minus 10-15 %**



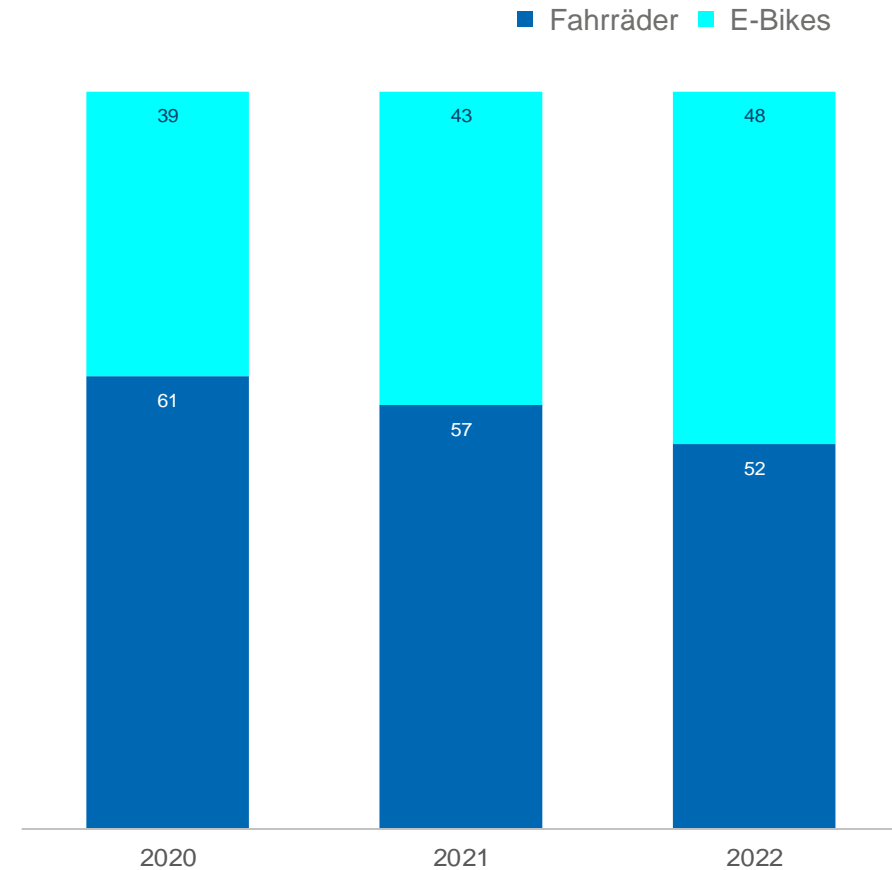
Quelle: ZIV

Anteile Fahrräder und E-Bikes im Verkauf in Deutschland (in Prozent)

Auf der Überholspur: E-Bikes mit einem Anteil von 48%

- Der Anteil der E-Bikes im Verkauf steigt in Deutschland von Jahr zu Jahr weiter.
- 2022 herrschte fast Gleichstand zwischen Fahrrädern und E-Bikes:
- **Fahrräder: 2,4 Mio. (52%)**
- **E-Bikes: 2,2 Mio. (48%)**

- **ZIV-Prognose für das Jahr 2023:**
Wir gehen davon aus, dass 2023 erstmals mehr E-Bikes als Fahrräder in Deutschland verkauft werden



Quelle: ZIV

Hervorragende Aussichten für das Fahrrad/E-Bike Herausforderungen

- **Fachkräftemangel**
 - ... ist längst Arbeitskräftemangel. Über alle Ebenen, Qualifikationsniveaus, Aufgaben finden Unternehmen der Fahrradbranche nicht genug Mitarbeitende.
 - Produktion fortzuführen oder auszuweiten wird zur Herausforderung. „Reshoring“ ist so nicht möglich.
- **Politische Unterstützung**
 - Anders als bei anderen Konsumgütern ist unseren Kund:innen die Nutzung unserer Produkte nicht uneingeschränkt möglich.
 - Wir erwarten Radwegenetze in Siedlungen und den Erhalt des Betretungsrechtes in der Natur.
 - Wir erwarten, dass die Radwegeoffensive des Bundes („Stadt und Land“) von jeglichen Haushaltskürzungen ausgenommen bleibt.



Büchel GmbH & Co. Fahrzeugteilefabrik KG / Standort Oederan (Sachsen)

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