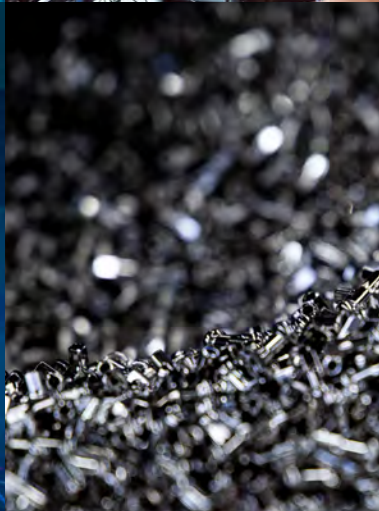


Welcome to the German Bicycle Industry

135 Years
Strong
Together



The year 2023 marks and uniquely combines tradition and new beginnings for the German bicycle industry and our association – we are celebrating the 135th anniversary of the ZIV and its predecessor associations, and at the same time we are realigning the ZIV by opening up to all players in the bicycle ecosystem:

135 years strong together

In 1888, the first pioneers of bicycle production in Germany came together to jointly represent the interests of their young, nascent industry. Between that time and today lie worlds, an empire, two wars, dictatorships, separation and reunification. The bicycle industry has never just passively experienced these processes, it has always tried to shape them, has exerted influence and helped to ensure that Germany in 2023 is not only an economically strong country, but also a modern one that is facing the future, recognizing the necessities of the time and playing a major role in technological progress and the mobility turnaround.

Even stronger in the future: realignment of the ZIV

The significantly changed framework, including rapid market growth, new players in the fields of mobility as a service or digital products, and strong external drivers such as climate, war, energy, raw materials and the mobility turnaround mean great opportunities for the bicycle industry. At the same time, they require a broadening of perspective and a change – also of the ZIV. The ZIV, which has also represented import and wholesale in the past, still carries ‚Zweirad-Industrie-Verband‘ in its name, but in the future will represent the complete ecosystem around the bicycle as an economic good.

The situation is promising: 80 million bicycles are the largest vehicle fleet in this country. 75% of the population uses bicycles. Every day, more trips are made by bicycle than by public transport. We have long since succeeded in vehicle electrification, bringing 10 million e-bikes into the fleet without a dime of subsidy.

We are the leading vehicle industry in this country in so many ways. Our story has just really begun!



Burkhard Stork
CEO

Welcome to the ZIV: the entire ecosystem bicycle

The opening of ZIV to other ecosystem players was decided by amendment of the association's statutes at the 2023 General Assembly. With immediate effect, all companies that manufacture or distribute bicycles, EPACS, e-bikes, related vehicles, parts or accessories, and products and services related to the use of these vehicles in the Federal Republic of Germany can become full members of the association.

As of now, the other players in the bicycle industry will also be admitted, including testing institutes and technical offices, manufacturers of testing equipment, universities (expert chairs), planners and executors of transport facilities as well as sports/event organizers, companies from the tourism industry including bike parks and bicycle insurers. Also welcome to ZIV are young companies and start-ups that are still in the process of formation and whose business model revolves around the bicycle.



For a strong German and international bicycle industry

The ZIV bundles and represents the interests of now around 120 member companies in exchange with legislators in Germany and the EU, the government, authorities, media, institutions and organizations. 90% of the bicycles and e-bikes produced in Germany in 2022 come from ZIV member companies.

The association's work encompasses a diverse range of tasks that continues to increase with the growing importance of bicycles and e-bikes in everyday life, leisure and sports, and as an indispensable service provider for the mobility of the future. With the new role of the bicycle, the economic significance of the industry is also becoming increasingly important. Germany is the largest market for bicycles and e-bikes in Europe. In e-bike technology, our members are among the innovation leaders worldwide. Every year, bicycle companies from Germany export around two million vehicles. More than 250,000 people are employed directly or indirectly by the German bicycle industry.



Anke Schäffner
Head of Policy & Advocacy



Katharina Hinse
Head of Economic and Industrial Policy



Tim Salatzki
Head of Technology & Standardization

The political voice for bicycles and e-bikes in Germany and Europe

The ZIV represents the interests of its members at the federal and state level and as a member of the European association CONEBI (Confederation of the European Bicycle Industry) at the European level. In political dialog with the legislative, executive and administrative branches, the ZIV ensures that the topic of bicycles and e-bikes is strongly positioned.

We are committed to improving the framework conditions for bicycle use and we work in close exchange with political decision-makers for an attractive economic and industrial policy environment for Germany as a bicycle location. A key objective is to ensure that the bicycle is finally recognized both legally and socially as an equal means of transport, because the bicycle offers solutions to several pressing political and social challenges – alongside walking, it is the most environmentally friendly, space-saving and healthy form of mobility. That's why it belongs at the top of the political agenda. That's what we're campaigning for.



Commitment to high safety and uniform international standards

The safety of products in the bicycle industry is the nuts and bolts for us. That is why ZIV's commitment to safety-related standardization at German (DIN), European (CEN) and international (ISO) level is a central component of our work. There are now European and international standards for almost all bicycle-related products, which provide a secure basis for production and sales for the players.

The ZIV chairs numerous technical committees or is involved in them. The rapid technical development and the market success of e-bikes contain a strong additional dynamic: special working groups drive the central topics forward – from standardization and risk analysis to the recycling of batteries and the transport of hazardous goods.

Bike Nature Movement: Initiative for cycling in the great outdoors

Until now, the promotion of cycling has often stopped at the edge of the forest. With the Bike Nature Movement project, the German Mountain Bike Initiative, the Mountain Bike Tourism Forum Germany and the ZIV are joining forces to give cycling in the forest and in the open countryside more visibility and political weight.

Active agenda setting for bicycles

The importance and attractiveness of the bicycle continue to increase some 200 years after its invention. The ZIV engages in active agenda setting and the corresponding communication with the aim of sustainably promoting the image of bicycles and e-bikes among all relevant target groups and the entire population.

The measures range from media work with press conferences, background discussions and press releases to social media communication on Twitter and LinkedIn to trade fair appearances, the staging of industry events and cooperation with numerous partners. This work also includes intensive and active internal communication via digital channels and live formats to ensure close exchange and a uniform level of information among members.

BIKE NATURE MOVEMENT



The bicycle market in figures: ZIV Market Data

For more than 50 years, the ZIV has been publishing – exclusively – the economic figures of the German bicycle industry. The ZIV Market Data is the central source for surveying, monitoring and analyzing the development of the industry and additionally provides an outlook on trends as well as the future of the market.

For years now, the most notable trend has been the rapidly growing importance of e-bikes. In 2022, they accounted for 48% of total sales and are expected to exceed the number of bicycles sold for the first time in 2023. The ZIV's statistics also reflect the growing variety of models and range of innovations in bicycles and e-bikes. For example, the figures have also included the development of the cargo bike category for years. In 2023, data for the bicycle trailer market, which has been severely underestimated to date, is included for the first time.

The current 'ZIV Market Data Bicycles and E-bikes 2022' can be found on our website ziv-zweirad.de or with this QR Code:



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