

February 2025

Bicycles and e-bikes «Made in Germany» – impetus for the 21st legislative period



**Bicycles and e-bikes
«Made in Germany» – impetus for
the 21st legislative period**

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- 2** Modernise administration and streamline bureaucracy to ensure efficiency
- 3** Implement reliable, plannable sustainability regulations
- 4** Consistently leverage digitalisation to enhance sustainability and the customer focus
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Burkhard Stork
CEO

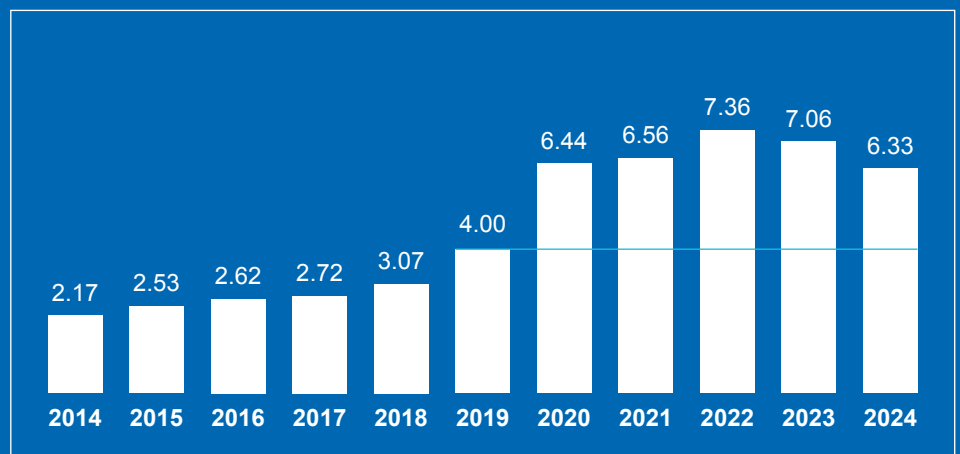
«This legislative period will be decisive to the economic development of both our country and our industry. The current challenges are significant, also for the bicycle industry. We wish to continue our long tradition in Germany, hence we are working closely with the policy-makers.»

The elections for the twenty-first German Bundestag mark the start of a new legislative period, which is expected to run from 2025 until 2029. Given the current global political and economic situation, these will be crucial years for Germany and Europe, during which the next federal government, state and local governments, European Commission and all social powers will need to take decisive steps to advance the economy in Germany and Europe.

The bicycle industry is a historic tradition in Germany and harbours vast potential for the future: we were and are pioneers in numerous developments – for instance, as the leading vehicle industry in this country with the largest fleet of electric vehicles. In 2023, the value of bicycles and e-bikes (EPACs) sold in Germany totalled more than €7 billion. At the same time, the bicycle industry provides secure employment for more than 350,000 people in our country. Plannable, attractive policies and regulatory framework conditions are needed for Germany to remain a hub for cycling in the long term and to advance the bicycle industry as a future-oriented industry.

Stable sales in the long run

Revenue from bicycle and e-bike sales in Germany (in billion euros)



Full ZIV market data for 2024

1

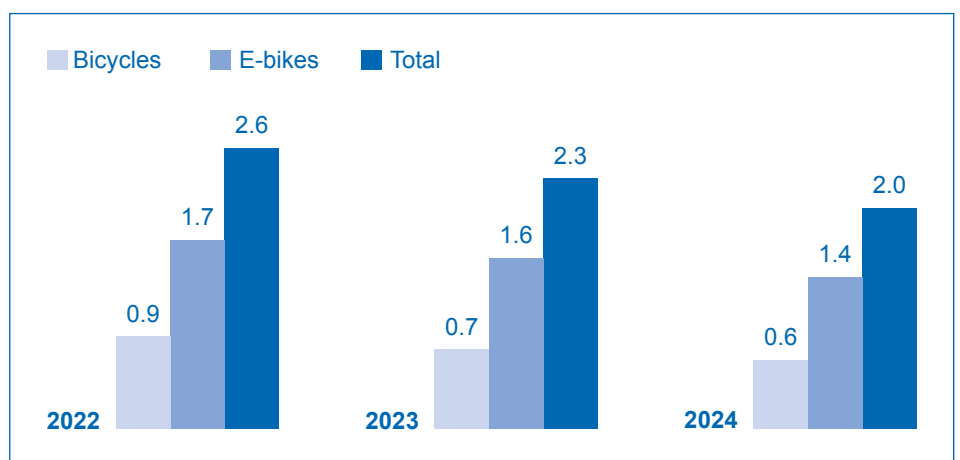
Safeguard Germany as a production location for bicycles, e-bikes and bike parts

Germany has long been a location for the production of bicycles. Today, it is one of the most important bicycle markets and manufacturing centres in the world and a global leader for innovation and trends. In addition to the manufacture of bicycles and e-bikes, significant value is also generated in Germany through the production of parts.

When it comes to the electrification of bicycles, the German bicycle industry is a pioneer. We have put 12 million electric vehicles on the roads in Germany without any subsidies. The current challenging economic situation has also left its mark on the German and European bicycle industries though. Germany needs plannable, attractive economic policy framework conditions if its bicycle industry is to remain at the forefront in the long term. This includes reliable regulation, competitive energy prices, fewer bureaucratic hurdles and a well-trained workforce.

Production remains high, but has declined slightly

Production of bicycles and e-bikes in Germany (in million units)



Katharina Hinse
Head of Economic and Industrial Policy

«The German bicycle industry remains committed to Germany as a production location. To retain our competitive edge here, we need the right regulatory framework and policies: less bureaucracy, a highly skilled workforce, competitive energy prices, and reliable regulations.»





2

Modernise administration and streamline bureaucracy to ensure efficiency

We recognise the immense value of a well-functioning administration and a well-organised society. Indeed, we all benefit from this. However, we also experience every day how outdated processes, poorly equipped public authorities and excessive bureaucracy hold us back. When vocational colleges don't work, decisions on residence permits take years, production figures have to be faxed (!) to various authorities and employees remain on sick leave for weeks while they wait for specialist appointments, then it becomes clear just how urgent it is to tackle the modernisation and digitalisation of administration in the new legislative period, eliminate unnecessary procedures and streamline necessary ones.

3

Implement reliable, plannable sustainability regulations

As producers of sustainable modes of transport, sustainability has long been an important factor for the bicycle industry. For a growing number of companies, sustainable business practices are becoming an integral part of their corporate strategy along the entire supply chain. Product and process innovations help to make the design and manufacture of bicycles and e-bikes more sustainable. The growing number of sustainability regulations today also apply for many bicycle and part manufacturers, who are of course adapting to meet these requirements. To do so effectively and without economic disadvantages, reliable and predictable sustainability regulations with reasonable implementation timelines are needed. Sustainability and competitiveness must go hand in hand. The back-and-forth seen with the German act on due diligence in supply chains (LkSG) damages the economy and penalises those who have already committed to change. The reliability of the proposal («Omnibus» package) recently presented by the European Commission to simplify the sustainability reporting obligations must be viewed critically. For it would ultimately above all mean companies are unable to plan as effectively during the ongoing legislative process.



4

Consistently leverage digitalisation to enhance sustainability and the customer focus

New regulations must be designed so that all information and documentation obligations can be fulfilled entirely digitally. The first steps have already been taken in this area with the Digital Product Passport (DPP), the Digital Battery Passport that preceded it and digital user manuals. However, a data ecosystem or space that offers the seamless integration of DPPs for the bicycle industry is needed for sensible implementation. The ZIV will get actively involved in this area in the new legislative period. Like other sectors, the bicycle industry is dependent on financial support and coordinated efforts by policymakers.

5

Enforce existing laws effectively and reinforce market surveillance

Effective, standardised and enforceable market surveillance is above all required in the e-bike sector to ensure consumer protection and prevent unfair competition, also from suppliers in third countries. In recent months, major online platforms have brought non-compliant, unsuitable products into the country almost without restriction. Customs authorities should also be better equipped and granted greater powers to enable them to identify non-compliant products at the point of entry.

6

Reform VAT structures

The European Commission already tasked member states with reforming the VAT system taking sustainability criteria into account years ago. Germany has not yet even begun however. We believe that a reduction in the VAT rate for bicycles, e-bikes, parts and services to 7 percent would constitute an important lever to strengthen the bicycle industry in Germany and at the same time create a modern and sustainable mobility system.

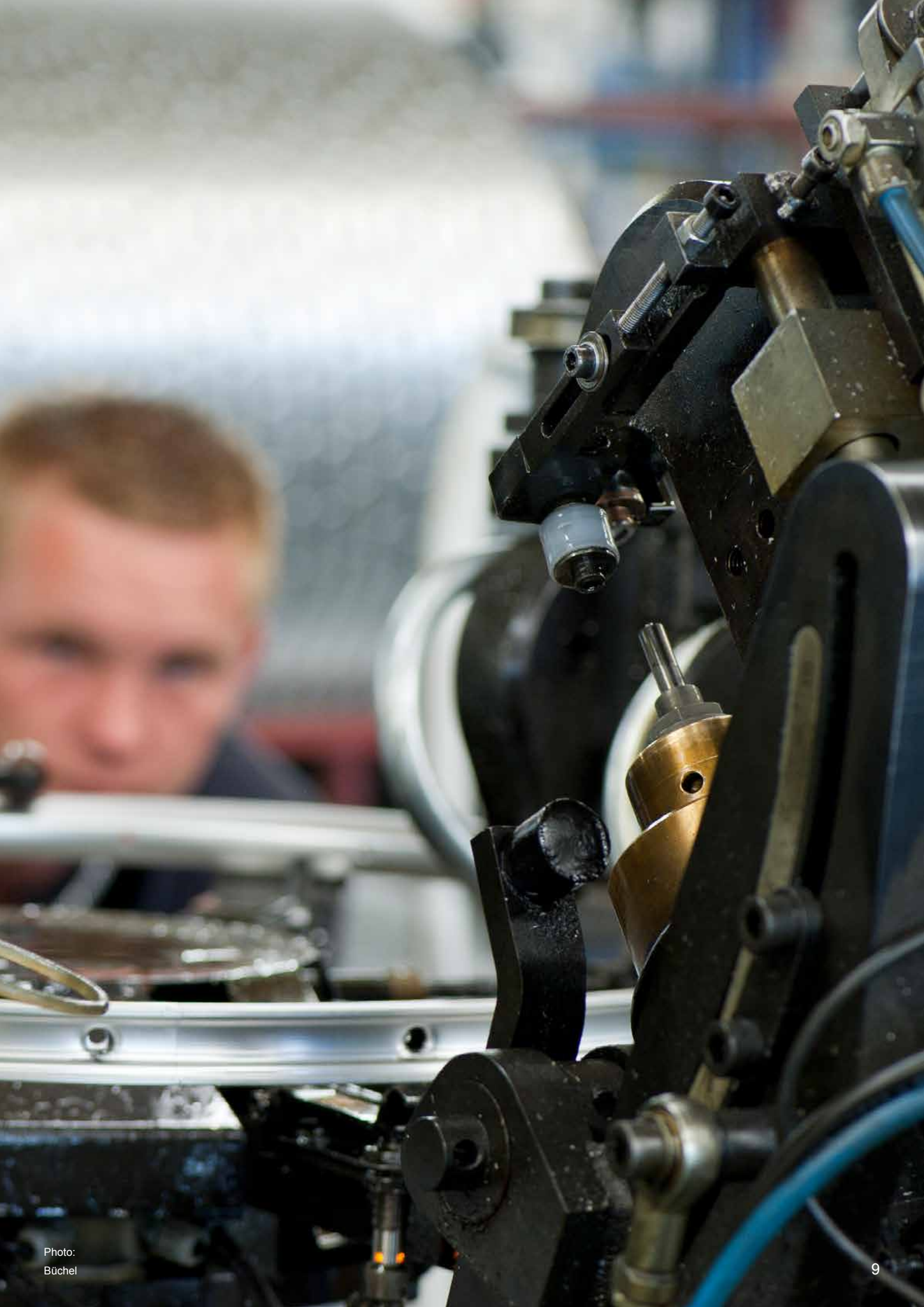


7

Combat the shortage of skilled labour

In our industry, skilled trades such as bicycle mechatronics and engineering professions are severely affected by the shortage of skilled labour. To ensure that this does not hinder the industry's positive development and the modernisation of transport, concerted efforts and reliable regulations are needed for integrating in international skilled workers. ZIV members are involved in guilds and chambers, many of which rely on voluntary action. Given the demographic challenges, the federal government must urgently prioritise, coordinate and support the modernisation of these structures in the new legislative period.

The academic training of engineers for vehicle technology is outdated. Many institutions for vehicle technology still have chairs for combustion engines, but there is not a single chair or academic training opportunity in Germany for bicycle and e-bike technology. The ZIV proposes the establishment of three chairs initially, endowed by the federal government for the 21st legislative period. The bicycle industry will contribute as much as it can to the provision of appropriate equipment for research and teaching.



Help develop European regulations for e-bikes

Key regulations will also be decided in Brussels in the new legislative period. E-bikes (formally known as EPACs) are a major growth driver in the bicycle industry and a mainstay of the sustainable modernisation of transport. They make the switch to cycling easier for many people. This success and the dynamic market have only been possible due to the legal classification of e-bikes as bicycles. This legal status must therefore be retained. The introduction of type approval for e-bikes would severely jeopardise this success. At the same time, however, we recognise the need for more precise definition of the e-bike category to continue to ensure a clear distinction from type-approved motor vehicles. We expect the next federal government to work with us to prevent the excessive regulation of e-bikes (EPACs) in the upcoming regulation of personal mobility devices (PMD).



Tim Salatzki
Chief Technology Officer

«E-bikes (EPACs) must retain their legal status as bicycles. Losing this status and introducing type approval would severely jeopardise their success and, with this, the future of the entire bicycle industry.»

The EU Battery Regulation imposes many technical and bureaucratic requirements on producers and manufacturers of batteries for e-bikes (LMT batteries). Efforts must be made when implementing the regulation to ensure that it is compatible with the industry and also feasible in practice. Focal points here include the fulfilment of due diligence obligations, organisation of a take-back system and opportunities for battery manufacturers to participate in the regulatory process.

On the national level, the terminology used by the German Federal Ministry of Transport has led to confusion about e-bikes (EPAC/pedelec/E-Mofa, etc.). The ZIV will submit a constructive proposal for clarification as soon as a new department has been formed after the elections and expects a practical solution.



Expand appealing cycling infrastructure and secure long-term funding

To transform Germany into a cycling nation, we need safe and inviting cycling infrastructure throughout the entire country. The special urban and rural programme introduced by the CDU-led federal government during the 19th legislative period has proven extremely successful and provided an important boost to the expansion of cycling infrastructure in German municipalities. The programme must be continued in the 21st legislative period and beyond, with secure funding in the long term. The special fund planned for infrastructure should therefore also be used to rapidly expand the cycling infrastructure all across Germany. This would benefit millions of cycle commuters, bicycle tourism, and our country's economy.

The federal government also launched an excellent framework for cycling policy during the 19th legislative period, the National Cycling Plan 3.0. A concrete action plan is now needed to ensure its consistent implementation. The bicycle industry and the ZIV will continue to fully support its implementation.

The regulations for transport infrastructure in Germany are outdated and still based on concepts of car-focused urban planning that are now obsolete and an expectation that cyclists are fearless. In future, the legislators must intervene more in the development of regulations with which the Road and Transportation Research Association (FGSV) is currently tasked. This must be addressed in the new legislative period.



Anke Schäffner
Chief Policy and Advocacy Officer

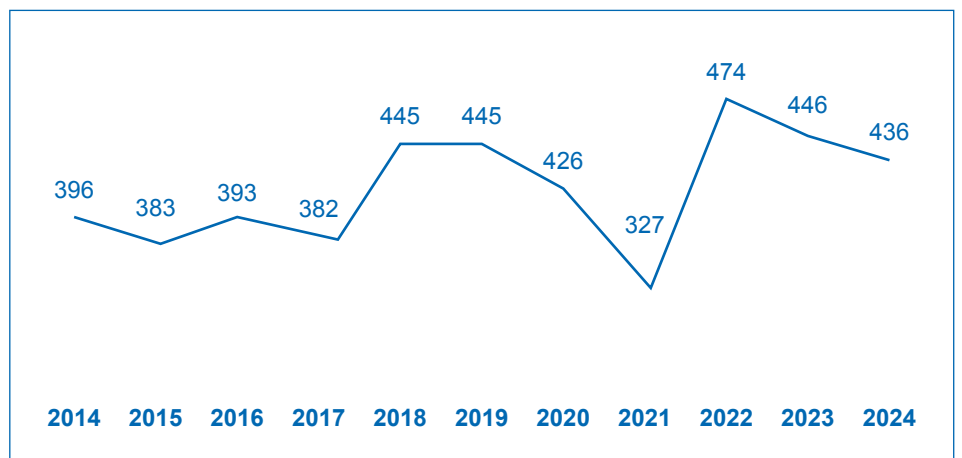
«Let's finally make the vision of Germany as a cycling nation a reality – that's my appeal for this legislative period. Favourable conditions have been created with the special urban and rural programme and the National Cycling Plan 3.0. These must now be implemented swiftly.»

10

Improve road safety and commit to Vision Zero

Improving road safety for all road users, but particularly for vulnerable groups such as children and the elderly, cyclists and pedestrians, must be a central goal of the new federal government's transport policy. The guiding principle of Vision Zero must finally be enshrined in law. To achieve this vision, road safety in Germany must be fundamentally restructured and a safe system approach developed. This includes ensuring sufficiently dimensioned, safe and ideally separate infrastructure for cyclists and pedestrians as well as greater integration of vehicles in the communication systems of automated driving. The ZIV and its innovative member companies will actively contribute to this development.

Number of cyclists killed in road traffic accidents remains high



BMDV: Traffic statistics for 2024/25, Destatis 2025



Develop a cohesive strategy for leisure and everyday cycling

500 million day trips by bike, 16 million mountain bikers, 10 percent of German tourism turnover from cycling holidays: cycle tourism has long been the backbone of tourism in Germany and a driver of employment, especially in economically weak regions. The cycling infrastructure for leisure/tourism and everyday cycling are still not being considered, planned and financed together though – to the detriment of both. The planning must be interlinked and coordinated. A new beginning is required, involving closer cooperation between the various ministries, administrations and government levels in the federal states, municipalities and districts. Given the changes in tourism due to the increasing lack of snow: the federal government must make a fresh start in the 21st legislative period and finally assume its role as a moderator and driver with genuine commitment. The ZIV and its partners have already made proposals.

37 million

people cycle while on holiday or go on cycling trips



18.5 million

people cycle more in their everyday lives after a cycling trip



344 million

people go on a cycling day trip



16 million

people enjoy mountain biking



2024 ADFC Bicycle Travel Analysis, Allensbach 2021



12

Ensure free access to forests and nature

More than 62 million people in Germany seek and find recreation in forests, either on foot or bike. Due to the relevance of recreation to the common good and the preservation of the physical and mental health of people of all ages, the equal importance of recreation compared to other forest functions should continue to be taken into account in future revisions of federal and state forest laws. This includes the free right of access for cyclists on roads and pathways in the German federal forest act (Bundeswaldgesetz, BWaldG) and harmonisation of the different regulations in the state forest legislation.



Svenja Golombek
Head of Sport, Leisure and Tourism

«A lack of physical activity is a serious problem with far-reaching consequences for the healthcare system. Encouraging cycling in everyday life and for recreation is one of the best ways to maintain or improve health.»

13

Promote health and prevent illness

A lack of exercise and deficits in the development of motor skills are omnipresent among society. Bicycles are the ideal mode of transport and recreational tool for improving health and should play a central role in both disease prevention and sports promotion. For health, education, transport and environmental policy reasons, mobility education and promotion should also be included in the curriculum at day-care centres and primary schools, as only ten percent of girls and twenty percent of boys in Germany actually get enough exercise.

Specially adapted bikes are a great way for people with disabilities to participate in everyday life. However, it is becoming increasingly difficult to obtain adequate funding from statutory health insurance providers. In the new legislative period, the ZIV will work closely with the self-administration of the healthcare sector to push for the greater inclusion of bicycles as assistive devices.





More information

All ZIV positions and background papers with in-depth explanations on the tasks for the 21st legislative period as well as other political, economic and technical topics relevant to the bicycle industry are available for download on the **ZIV website (ZIV > Positions)**.



About the ZIV

As an industry association, the ZIV brings together and represents around 140 member companies vis-à-vis lawmakers in the EU and Germany, the German government, authorities, media, institutions and organisations. In 2023, ninety percent of the bicycles and e-bikes produced in Germany were from ZIV member companies, which export 1.4 million units every year in addition to sales on the domestic market. The ZIV represents established companies and start-ups, manufacturers and retailers (including importers and wholesalers) as well as players from the entire bicycle ecosystem.

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