

Resilient despite headwinds

Bicycle industry stable in 2025 – new business areas lend strength

Berlin, 11 March 2026 | The associations of the German bicycle industry presented their market data for 2025 today. Despite a challenging environment, the industry was able to hold steady and stabilise at a good level. The ZIV, VSF and Zukunft Fahrrad expressed cautious optimism about the market developments: though 2025 also brought challenges, the bicycle industry once again demonstrated strength and resilience. The associations see additional value creation opportunities for the entire industry in 2026– particularly through leasing potential and the further professionalisation of workshop services.

Bicycles and e-bikes

Production stable In 2025, there were a total of 90.6 million bicycles and e-bikes in Germany – an increase of more than 25 per cent in the past ten years. Bicycle production rose 3 percent to 658,000 units, while e-bike production dropped 3 percent to 1,285,000. Production therefore remained stable overall. Turnover from the sale of bicycles and e-bikes fell 7.7 percent to 5.85 billion euros – a considerably smaller decline than in the previous year.

E-bikes continue to dominate A total of 3.8 million units were sold in 2025 – down 3.9 percent compared to 2024. The decrease in the number of e-bikes sold was larger than it was for bicycles. E-bikes held a 52.7 percent share of the market and bicycles a 47.3 percent share. Sales remained high nonetheless, with around 2 million e-bikes sold. Overall, there are now more than 17 million e-bikes on the roads in Germany – a clear lead in Germany’s e-mobility landscape compared to the roughly 2 million electric cars.

Increase in exports, continued normalisation of stock levels The average sale prices for e-bikes dropped slightly, while prices for classic bicycles remained stable. Though discounts put pressure on the sale prices, the consistently high demand for racing bikes and gravel bikes ensured stability. Exports rose in both segments: bicycles by 10 percent, e-bikes by as much as 12 percent. The number of bicycles exported returned to the level of 2023, totalling 1.39 million. At the same time, retail and industry continued to reduce their in part high stock levels, with a return to the normal level expected by the end of this year.

Burkhard Stork | CEO, ZIV:

«The latest figures show that the bicycle industry is levelling off at a stable level. There are of course fluctuations, but the industry again proved in 2025 how robust it is. Particularly noteworthy: demand is less sensitive to economic fluctuations than is often assumed. The market mix is shifting slightly – the share of classic bicycles is currently increasing, while the e-bike market is correcting slightly at a high level. Overall, the bicycle industry remains a reliable guarantor of long-term value creation.»

Company bike leasing schemes and refurbishment

**Leasing withstands challenges
– 60,000 new employers confirm
growth potential**

The annual study by Deloitte and Zukunft Fahrrad shows: for the second year in a row, total sales in the company bike leasing segment were slightly lower than in the previous year, lying at 2.8 billion euros. The number of newly leased company bikes decreased 5 percent to 0.72 million. The fleet continued to grow nonetheless due to the strong overall performance in the past three years; in 2025, a total of around 2.2 million bikes were leased through company schemes. At the same time, the popularity of company bike leasing schemes continued to grow: the proportion of employees to take advantage of such an offer rose from around 8 percent of potential users in 2021 to 11 percent in 2025. Great potential still exists here – especially if the overall conditions for cycling are improved and more people can be convinced of the benefits of cycling. The number of employers committed to cycling is also on the rise: more than 340,000 companies now offer their employees the option of leasing a bike as a benefit.

**Refurbishment market growing
– market finally emerging for
«good used bikes»**

With a growing number of leased bikes now being returned, the refurbishment market is also gaining in importance. Professionally refurbished, high-end used bikes meanwhile hold a tangible share of the overall market. Since 2023, the number of refurbished bikes sold each year has risen by around 192 percent. Growing acceptance across all income groups and increasing internationalisation ensure very positive prospects.

Wasilis von Rauch | Managing Director, Zukunft Fahrrad

«Company bike leasing schemes remain an essential stabiliser for the bicycle industry – especially for high-end bikes from specialist retailers. While the market is now normalising after the rapid growth of the record years, major opportunities still exist, with over 60,000 new employers now offering bike leasing and conversion rates continuing to rise. At the same time, the refurbishment market is opening up new prospects: returned leased bikes offer great potential for making high-end bikes accessible to more people. There are real opportunities here – for an intelligent circular economy and attractive offers for broader target groups.»

Specialist retail

Opportunities for retailers in workshop services

Despite the decline in recent years, specialist retailers' turnover remains well above the pre-pandemic levels and average selling prices are still stable. The workshop business continues its growth trajectory with a 13 percent increase in sales in 2025.

«In our view, service quality is crucial for the development of bricks-and-mortar specialist retailers,» says **Uwe Wöll, Managing Director of VSF**.

With attractive leasing offers, innovative products such as gravel e-bikes and light e-bikes, and fast and reliable workshop services, specialist bike retailers will have nothing to worry about. *«If we manage to establish a strong partnership between industry, service providers and retailers, then we can look forward to positive development across the entire bicycle market.»* Wöll adds.

The bicycle industry has not only withstood the fluctuations of recent years, but also strengthened its position at a high level. Countless opportunities still exist along the value chain, especially in the service sector (bike insurance and workshop services, for example). The boom in recent years has given rise to a robust, stable market volume. Meaning that the bicycle industry still has the foundations to develop the market innovatively and dynamically. Among others, it will be decisive whether new or previously under-represented target groups such as women and children can be reached more effectively. Good framework conditions, safety in everyday cycling and equal treatment in transport funding will help make cycling attractive to more people – policymakers must play their part here.

Verbund Service und Fahrrad (VSF)

The German Service and Bicycle Association (Verbund Service und Fahrrad, VSF) is an independent trade association for the bicycle industry. It currently represents 390 retailers, manufacturers and service providers, and advocates high quality standards, sustainability, fairness and reliability. Its core competences lie in networking within the industry and liaising with policymakers. The VSF develops innovative concepts for the entrepreneurial success of its members and is passionately committed to increasing the share of cycling. Its members and partners appreciate the close cooperation and strong sense of community.

vsf.de

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ZIV – German Bicycle Industry The ZIV represents the interests of and is a strong voice for the Germany bicycle industry. 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 2024, around 90% of the bicycles and e-bikes produced in Germany were from ZIV member companies, which export 1.3 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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Zukunft Fahrrad Zukunft Fahrrad brings together more than 100 companies from the bicycle industry, from start-ups to global leaders. With innovative products and services, the industry helps make people and companies mobile, creates sustainable jobs and drives regional economic growth. Germany is a leading international market and innovation hub for bicycles and e-bikes. Zukunft Fahrrad is committed to safeguarding and expanding this competitive edge.

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