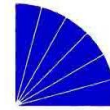




Confederation of the European  
Bicycle Industry  
Colibi-Coliped  
Since 1960 Representing the European Bicycle Industry



EUROPEAN  
BICYCLE  
MANUFACTURERS  
ASSOCIATION

# EUROPEAN BICYCLE MARKET EMPLOYMENT AND INVESTMENT FIGURES

in 2018

Update March 2019

OPEN VERSION

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Dear Ladies and Gentlemen,

**Please kindly find enclosed the latest results of our research for our EU Bicycle, Pedal-Assist Ebikes and Components Industry in Europe.**

After the first study of December 2012 and the second one in December 2016, this March 2019 update is very important, as it is underlining the current expansion of our EU Bicycle, Pedal-Assist Ebikes & Components Industry both in jobs, investments and number of sustainable Manufacturing SMEs, thanks to the Antidumping-Antisubsidy measures adopted by the EU COM against unfair competition and subsidized dumping, and to our innovations, which make our Industry the most innovative in the world.

Our Industry is a very good example of an EU sustainable economy developed locally by SMEs: realistically, the only possible way to seriously cut CO<sub>2</sub> & sulphuric dioxides emissions, and create good long term industrial jobs locally for our younger generations, is to help and defend the development of EU Manufacturing SMEs. We are one of the largest employers of the EU Green Industries.

The expansion is mainly due to the further development of our most important innovation of the last 20 years: the Pedal-Assist Ebike, which would not have been invented if our Industry didn't survive the unfair competition from PRC's exporters. We have now over 106.000 Workers Direct-Indirect, and more than 800 SMEs capillary distributed in 24 of the 28 EU Member States, generating over 1 Billion EU investments and approximately 13 Billions EU worth of Industrial output. Our Workers and SMEs are extremely thankful to the EU COM's adoption of antidumping-antisubsidy for PRC's originated Pedal-Assist Ebikes, and also hope in the EU COM's adoption of the renewal of antidumping for the regular bicycles early September 2019 against subsidized dumping from PRC.

**We kindly ask you to take the following points into consideration:**

- 1) CONEBI is considering in our yearly Industry Data the data provided by our National Associations and Industry Experts. Indeed, not all producers of Bicycles, Pedal-Assist Ebikes and Components are member of a National Association (probably not over 50%) and this explains why these figures are higher and different from the annually provided data by Colibi-Coliped in the years before 2013.
- 2) Bicycles, Pedal-Assist Ebikes and Components are produced in Europe by the vast quantity of over 800 SMEs with a direct workforce of approximately 53.000 European employees.
- 3) A very important number of upstream ancillary companies furthermore provide:
  - **raw materials** (aluminum, steel, stainless steel, plastics, carbon fibers, titanium, magnesium, paint)
  - **machinery, tools, technical equipment**
  - **maintenance of the technical equipment**
  - **maintenance and enhancing of industrial buildings**
  - **canteen and catering for the Workers**
  - **transports**
  - **packaging materials**
  - **other services**

We calculated that this means that at least another approximately 53.000 jobs upstream are involved, in many industrial districts of the 28 MS. Many ancillary companies are at serious risk to disappear if the Bicycles, Pedal-Assist Ebikes and Components producers are forced to shut down by the dumping and ever growing overcapacity of subsidized Chinese Exporters. This calculation of one direct job equals one indirect one is a very

conservative estimation as can be seen by the [attached studies](#) about the correlation between direct and indirect jobs in the manufacturing industry.

4) We must emphasize that we have to take into consideration all the EU producers of those accessories (cycling apparels, helmets, and other aftersales accessories) which are not assembled directly to the bicycles. Nevertheless, we must point out that - in case of bicycles would be imported from China - for sure also all the accessories will be produced over there, to be shipped together with the bicycles.

In total, we have another 10.000 workers who are directly employed by such accessories producers, with again as many indirect workers who supply the raw materials, machineries and so on. In the USA and Japan - where they completely lost their Bicycle Industry as no AD measures were renewed - not one company is left producing any accessories for bike riders, everything is imported from China, like the Bicycles & Pedal Assist Ebikes. If Europe shall lose its industry, an almost worldwide monopoly of China will be the result, with the exceptions of Mexico, Brasil, Argentina, Turkey, India and Bangladesh (these countries all have antidumping or high duty regulations to allow their industries to have a legitimate defense against subsidized dumped products from Chinese exporters).

5) We must underline as well that - in case the EU Bicycle Producers would be put out of business by the subsidized PRC's dumping - the whole production of high-tech EPACs (Electrically Pedal Assisted Cycles) and E-bikes will disappear in Europe, to be absorbed by the Chinese exporters. It would not be economically viable to produce only Pedal-Assist E-bikes in Europe, without the Bicycle production. This would be a very dangerous loss of a very promising, high-tech, very innovative and totally green EU Industry: really strategic in the EU for the CO2 emissions cuts. The EPACs were invented and developed in Europe by the EU Bicycle and Components Industries. We are now developping with the EU COM as well as the Motorcycle and Car Industries the connectivity among vehicles, which will save many thousands of lives of cyclists, making cycling much safer. We also underline another important innovation of our Industry: the bike sharing systems. This concept needs local production in order to provide the best bikes for European cities: a very good example is the bike sharing system in Paris.

Some of our SMEs are also specialists for bikes rentals for hotels and holiday resorts, which greatly help the development of tourism & cycling.

[Bike sharing desasters](#) like the one which happened in China must be avoided, as it is very negative for the image of bicycles and pedal assist ebikes with the [EU Consumers](#), who want better quality, service and a variety of products.

Another new trend for our SMEs is to develop Cargo Bikes which are adopted for the last 5 km deliveries in the EU Cities by many couriers, and also by families with kids for very happy rides on weekends.

6) Also in the downstream there would be a loss of jobs, especially at the dealers' level. Totally we have in Europe more than 50.000 bicycle retailers, with an estimated workforce of 150.000 Workers: indeed one of the main reasons that the EU Users (ECF represents millions of cyclists) are against subsidized dumping on Bicycles & Pedal Assist Ebikes is precisely the menace of poor quality and the loss of service at the dealers' level (confirmed in the [attached](#) Japan Industry presentation). With the huge Chinese overcapacity, the hypermarkets and hard discounts' sales (without service) will increase with very low quality bicycles (which are bought as cheap gadgets but don't encourage cycling at all, as confirmed by the [attached](#) ECF letters.

We conclude our study by confirming to your kind attention our deep alarm that over 106.000 EU skilled Workers of one of the most important Green Industries' are at risk to lose their jobs without the current antidumping measures.

The entire EU Industrial system will be weakened, as the EU Bicycle Industry adopts the most innovative and ecological production systems, raw materials and fine mechanics as well as high tech automations.

We underline the ecological sustainability of the EU Bicycle Industry. This industry adopts the latest technologies of non-pollution production (for instance water-based paint, while the PRC's exports are adopting very dangerous paint contents, which can be very harmful in particular for kids bikes) in full respect of the highest level of EU regulations such as REACH.

The EU Bicycle Industry delivers very innovative, high quality bicycles with very low CO2 emissions, compared to Chinese exported bicycles or pedal assist ebikes, which cost from 61 to 123 kgs of emissions more than manufactured in the EU, as confirmed by the study of the [Milan Politechnico](#).

This means that if all 20 million bicycles & ebikes sold in the EU per year would be imported from China, this will cause extra emissions of over 2 million tons of CO2 and other dangerous emissions. RC is already the largest polluter in the World as PRC is pretending to be treated as a developing Country, to still adopt until 2050 coal based energy and coal based steel and aluminium production: the result is the largest pollution emission in history of mankind, as it can be easily be checked in [this](#) pollution/weather radar.

In the December 2012 study, we confirmed that the EU Bicycle and Components Industries would have invested heavily in the next 5 years to modernize the technical equipment, to develop new products and to repatriate and adopt production like frames, forks, handle bars, stems which are currently produced and subsidized in China. This effort is confirmed, our Industry is investing one Billion Euro per year, also creating "Bike Valley" projects in different EU Industrial Districts such as Romania, Belgium/Flanders, Portugal (see [here](#)).

Since then, the EU Bicycle, Pedal Assist Ebike and Components Industry invested over one billion euro per year, as you can see also for 2018 in this Study on EU Jobs & Innovations-Investments.

We are always available for your kind enquiries on these very important issues concerning our very innovative Industry, our Sustainable Manufacturing SMEs and very capable Workers.

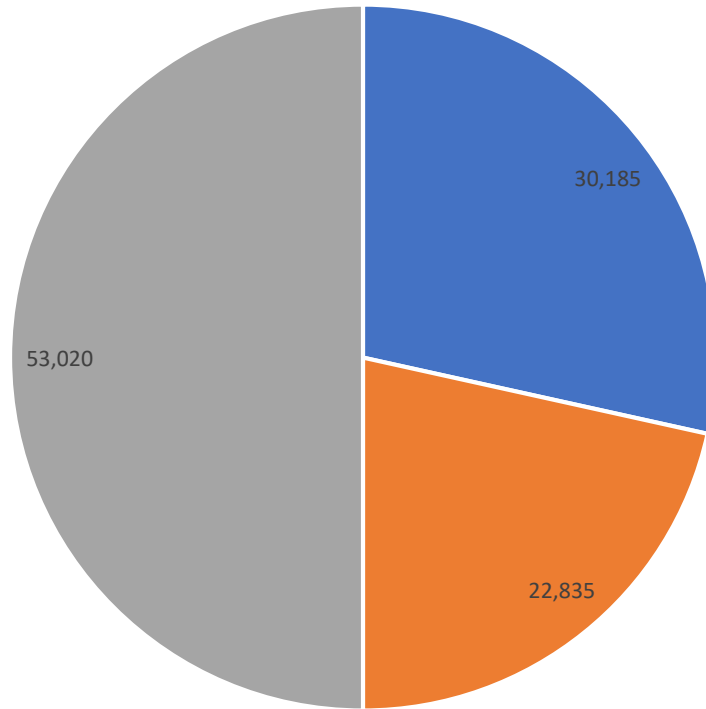
Very best regards

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## Employment (direct) and investments in EU Bicycle, EPACs and Parts Industry

Country	Bicycle and EPAC producers			Parts producers			Total employees per country	Total Investments/ Innovations in 2018 (mill EUR) per country
	No. of companies	Employees	Investments/ Innovations in 2018	No. of companies	Employees	Investments/ Innovations in 2018		
			(mill EUR)			(mill EUR)		
Austria	2	450	3.00	1	20	1.00	470	4.00
Belgium	16	425	6.45	11	209	2.75	634	9.20
Bulgaria	11	1,965	5.20	1	65	0.50	2,030	5.70
Croatia	2	20	0.20	-	-	-	20	0.20
Cyprus	-	-	-	-	-	-	-	-
Czech Republic	16	275	1.90	41	1,911	12.30	2,186	14.20
Denmark	7	118	1.25	3	40	0.35	158	1.60
Estonia	-	-	-	-	-	-	-	-
Finland	4	88	0.85	2	312	2.15	400	3.00
France	11	1,360	24.65	30	1,895	37.70	3,255	62.35
Germany	44	6,204	76.25	66	6,644	472.60	12,848	548.85
Greece	3	202	1.35	3	715	1.25	917	2.60
Hungary	8	1,505	60.35	17	580	3.50	2,085	63.85
Ireland	5	17	0.20	-	-	-	17	0.20
Italy	111	3,709	43.30	90	2,564	41.80	6,273	85.10
Latvia	4	29	0.30	-	-	-	29	0.30
Lithuania	1	600	1.00	-	-	-	600	1.00
Luxembourg	-	-	-	-	-	-	-	-
Malta	-	-	-	-	-	-	-	-
Netherlands	23	2,639	30.15	29	1,000	12.33	3,639	42.48
Poland	69	5,758	65.65	12	430	4.05	6,188	69.70
Portugal	25	1,515	30.16	65	4,248	54.77	5,763	84.93
Romania	4	1,140	10.50	10	1,227	11.00	2,367	21.50
Slovakia	12	525	3.00	9	161	1.40	686	4.40
Slovenia	2	25	0.20	1	70	0.25	95	0.45
Spain	14	966	4.80	11	502	4.65	1,468	9.45
Sweden	3	160	1.60	1	5	0.50	165	2.10
United Kingdom	10	490	7.20	12	237	2.60	727	9.80
<b>TOTAL</b>	<b>407</b>	<b>30,185</b>	<b>379.51</b>	<b>415</b>	<b>22,835</b>	<b>667.45</b>	<b>53,020</b>	<b>1046.96</b>

### EMPLOYMENT EUROPEAN BICYCLE INDUSTRY



- Direct employment bicycle and EPAC producers
- Direct employment parts producers
- Estimated indirect employment