EU27+UK Bicycle, Ebike and Components Industry data since 2012:

2012
Investments/innovations = no data
Our Green Industry Jobs:
Direct: 36.402
Bicycles and Ebikes : 20.488
Components : 15.914
Total Direct and Indirect: 70.000
EU Sustainable Manufacturing SMEs: 703
Bicycles and Ebikes : 331
Components : 372

2016
Investments /innovations: 1.039.149.000 eu
Bicycles and Ebikes : 376.198.000 eu
Components : 662.951.000 eu
Our Green Industry Jobs:
Direct: 45.287
Bicycles and Ebikes : 24.768
Components : 20.645
Total Direct and Indirect: 90.000
EU Sustainable Manufacturing SMEs: 807
Bicycles and Ebikes : 384
Components : 423

2018
Investments /innovations 1.046.960.000 eu
Bicycles and Ebikes : 379.510.000 eu
Components : 667.450.000 eu
Our Green Industry Jobs
Direct: 52 536
Bicycles and Ebikes : 29 701
Components : 22 835
Total Direct and Indirect: 106.000
Sustainable SMEs: 822
Bicycles and Ebikes : 407
Components : 415

2021
Investments /innovations 1.764.000.000 eu
Bicycles and Ebikes : 924.873.000eu
Components : 839.127.000eu
Our Green Industry Jobs
Direct: 87.426
Bicycles and Ebikes : 45 989
Components : 41 437
Total Direct and Indirect: 155.000 (in the last CONEBI report just issued 170.000)
EU Sustainable SMEs: 1053
Bicycles and Ebikes : 568
Components : 485

EUROPEAN
BICYCLE
MANUFACTURERS
ASSOCIATION

EU BICYCLE INDUSTRY's GREEN EMPLOYMENT STUDY

December 2012

Colibi-Coliped
Bd. de la Woluwe 46 b16, b
1200 Brussels
Belgium

EBMA
Avenue de la Grande Armée, 13
75116 Paris
France

COLIPED vzw
Association of the European Two-wheeler
Parts' & Accessories' Industry

COLIBI
Representing the European
Bicycle Industry

EUROPEAN
BICYCLE
MANUFACTURERS
ASSOCIATION

Brussels, December 13th 2012

Subject: EU employment figures in bicycle- and parts industry

Ladies & Gentlemen,

Please find enclosed the results of our research for the EU Bicycle Industry in Europe. We kindly ask you to take the following points into consideration:

1) As Colibi-Coliped we are considering in our Yearly Industry Data the data provided by our National Associations. Indeed not all producers of bicycles and parts are member of a National Association (probably not over 50%) and this declares why these figures are higher and different from the annually provided data by Colibi-Coliped.

2) Bicycles and parts are produced in Europe by a vast quantity of over 700 SMEs (374 bicycle producers and 368 parts producers or OEM services like painting), with a direct workforce of approximately 35.000 European employees.

3) A very important number of ancillary companies provide these 742 producers with:

a) raw materials (aluminium, steel, stainless steel, plastics, carbon fibers, titanium, magnesium, paint)
b) machinery, tools, technical equipment
c) maintenance of the technical equipment
d) maintenance and enhancing of industrial buildings
e) canteen and catering for the workers
f) transports
g) packaging materials
h) other services (as in the attached list)

We calculated that with all this work at least another 25.000 to 30.000 jobs are involved. Many ancillary companies are at serious risk to disappear if the bicycles and parts producers are forced to shut down by the dumping of subsidized Chinese Exporters.

4) We must emphasize that we did not take into consideration 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 all 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 there is indeed not one company left producing anything for bicycles!
If Europe shall lose its industry, an almost worldwide monopoly of China will be the result, with the exceptions of Canada, Mexico, South America, Turkey, India, Bangladesh (these countries all have antidumping regulations to allow their industries to have a TDIs' legitimate defense against subsidized dumped products from Chinese exporters).

5) We must underline as well that -in case the EU bicycles producers would be put out of business by the Chinese dumping- the whole production of EPACS (electrically pedaling assisted cycles) and E-bikes will leave Europe, to be absorbed by the Chinese exporters. It would no longer be economically viable to produce only EPACS and E-bikes in Europe, without the bicycles production. This would be a very dangerous loss of a very promising totally green EU Industry, really strategic for the C02 emissions cuts. The EPACS were invented and developed in Europe by the EU Bicycles and Parts' Industries.

6) Also in the downstream there would be loss of jobs, especially at the dealers' level: indeed one of the main reasons that the EU Users (ECF represents millions of cyclists) are in favor of the antidumping is precisely the loss of service at dealers' level. With the huge Chinese overcapacity, there will be a price war which will force many dealers to shut down, or decrease the employees, while 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 confirming to your kind attention our deep alarm that over 60.000 EU skilled workers of the most important Green Industries' employer are at risk to lose their jobs if the antidumping measures which are currently in validity are not maintained.
The entire EU Industrial system will be weakened, as the EU Bicycle's Industry adopts the most innovative and ecological production systems, raw materials and fine mechanics high tech automations.

We underline the ecological sustainability of the EU Bicycle Industry. This industry adopts the latest technologies of non-polluting production in full respect of the highest level of EU regulations such as REACH. The EU bicycle industry delivers very innovative, high quality bicycles at almost zero km Co2 emissions (compared to the Chinese exported bicycles) to the EU users.

In case the current antidumping measures are confirmed, the EU Bicycles and Parts Industries will invest heavily in the next 5 years (after 3 years of waiting for the results of the expiry and interim investigations): to modernize the technical equipments, to develop new products and also to repatriate and adopt productions like frames, forks, handle bars, stems which are currently produced and subsidized in China.

The estimated investments will be exceeding 1 billion euro for the next 5 years, creating many new job opportunities for the European ancillary industries, and keeping the EU bicycles and parts industries on the lead of innovation worldwide.

With our best regards,

Moreno Fioravanti
COLIBI-COLIPED EBMA
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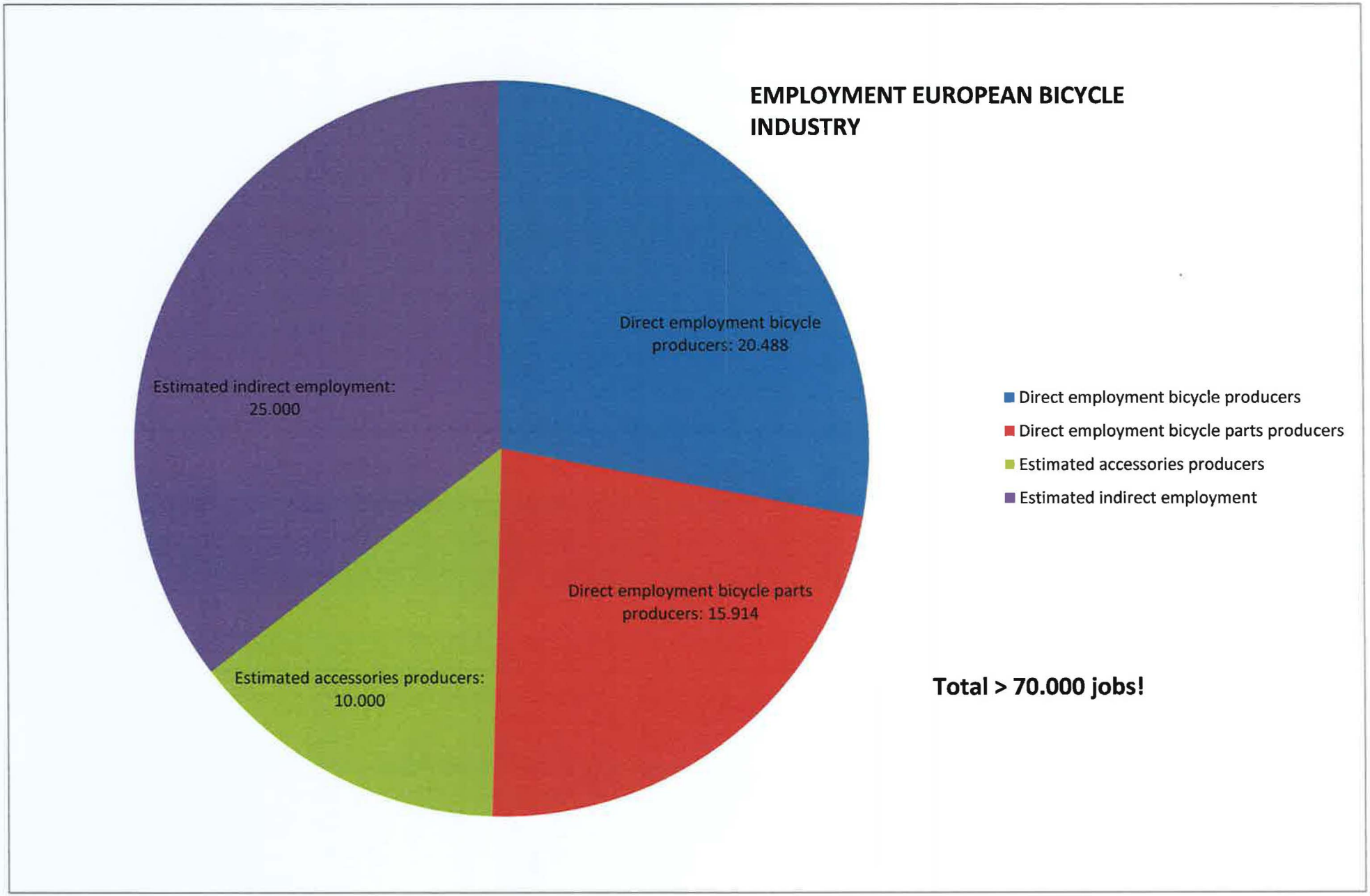
+39335226136

Employment (direct) in EU bicycle and parts industry

Country		Bicycle producers no. of companies	Employees	Parts producers no. of companies	Employees	Total employees per country
The Netherlands		20	2.285	36	1.062	3.347
Hungary		11	1.034	15	540	1.574
Germany		41	4.375	59	3.790	8.165
France		11	1.151	30	1.794	2.945
Belgium		14	316	13	293	609
UK		3	90	7	210	300
Denmark		7	106	4	31	137
Sweden		4	148	3	40	188
Finland		6	298	-		298
Estonia		-		-		0
Litouwen		1	450	-		450
Italy		111	3.354	109	2.532	5.886
Portugal		21	647	44	1.359	2.006
Spain		14	470	3	130	600
Poland [1])		42	2.200	10	800	3.000
Czech Republic		14	647	33	1.886	2.533
Slovakia [2])			280		90	370
Austria [2])			300		80	380
Bulgaria		7	1.362	1	57	1.419
Greece [2])			160	-		160
Romania		3	800	4	1.150	1.950
Slovenia		1	15	1	70	85
TOTAL		**331**	**20.488**	**372**	**15.914**	**36.402**

[1]) figures from national association and Colibi-Coliped

[2]) figures from Colibi-Coliped


EMPLOYMENT EUROPEAN BICYCLE INDUSTRY
Direct employment bicycle producers: 20.488
Direct employment bicycle parts producers: 15.914
Estimated accessories producers: 10.000
Estimated indirect employment: 25.000
Direct employment bicycle producers
Direct employment bicycle parts producers
Estimated accessories producers
Estimated indirect employment
Total > 70.000 jobs!

COLIBI

COLIPED
Association of the European Two-Wheeler Parts & Accessories' Industry

EUROPEAN BICYCLE MANUFACTURERS ASSOCIATION

EU EMPLOYMENT FIGURES
BRIEF EXPLANATION

EU Employment figures bicycle industry

- We investigated the employment in the European bicycle industry meaning EU members.
- We counted direct jobs at bicycle producers on one hand, and at parts producers on the other hand.
- Parts makers often not only make bike parts but other parts as well. We asked for employment figures related to bicycle parts so the presented figures are according to the companies directly related to bicycle parts.
- Although accessories have a close relation to the production in Europe, we did not count producers of accessories such as helmets, clothes, gloves, shoes, bottles, pumps bags and baskets ect. Only for products being directly delivered to the bicycle producers to come with a new bike (e.g. saddle bags, pumps, bottle holders) we counted the involved number of employees.
- When there is no longer a bicycle industry in Europe, of course far more jobs than the counted direct jobs are at danger. Examples of indirect upstream employment:

  - Suppliers of raw materials
  - Cleaning
  - Transport
  - Office supply
  - Machinery
  - Warehousing
  - Bookkeeping, accountancy
  - Marketing agencies
  - Warehouse equipment
  - Printing houses
  - Hotel, restaurant and conference facilities
  - Packaging materials
  - Coating and paintshops
  - Industrial designers
  - Construction, repair, maintenance of factories
  - Recycling
  - Energy
  - Testing equipment
  - .....

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

EUROPEAN BICYCLE MANUFACTURERS ASSOCIATION

EU BICYCLE INDUSTRY's GREEN EMPLOYMENT AND INVESTMENTS / INNOVATION STUDY

Open Version

December 2016

CONEBI
Bd. de la Woluwe 46 b16
1200 Brussels
Belgium

EBMA
Rue Archimede 77, Boile 64, Apt. 7D
1000 Brussels
Belgium

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 Dec. 2012, this Dec 2016 update is very important as it is underlining the current expansion of our Industry both in jobs, investments and SMEs, thanks to the Antidumping measures adopted by the EU COM against unfair competition and to our innovations which make our Industry the most innovative in the world.
Our Industry is a very good example of EU sustainable economy developed locally by SMEs: realistically, the only possible way to seriously cut C02 emissions and create good long term industrial jobs locally for our younger generations is to help and defend the development of EU Manufacturing SMEs.
The expansion is mainly due to the further development of our most important innovation of the last 20 years: the Pedal-Assist Ebikes, which would not have been invented if our Industry didn't survive the unfair competition from PRC's exporters. We have now over 90.000 Workers Direct-Indirect, and 800 SMEs capillary distributed in 20 of the 28 MS, generating over 1 Billion EU investments and approximatively 12 Billions EU worth of Industrial output: our Workers and SMEs are extremely thankful to the EU COM's renewal of the antidumping measures in 2013!

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

1) In CONEBI we are considering in our Yearly Industry Data the data provided by our National Associations. Indeed, not all producers of Bicycles Ebikes and Parts are member of a National Association (probably not over 50%) and this declares why these figures are higher and different from the annually provided data by Colibi-Coliped.

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 45.000 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 45.000 jobs upstreams 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.

4) We must emphasize that we must 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, all is imported from China, like the Bicycles.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, 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).

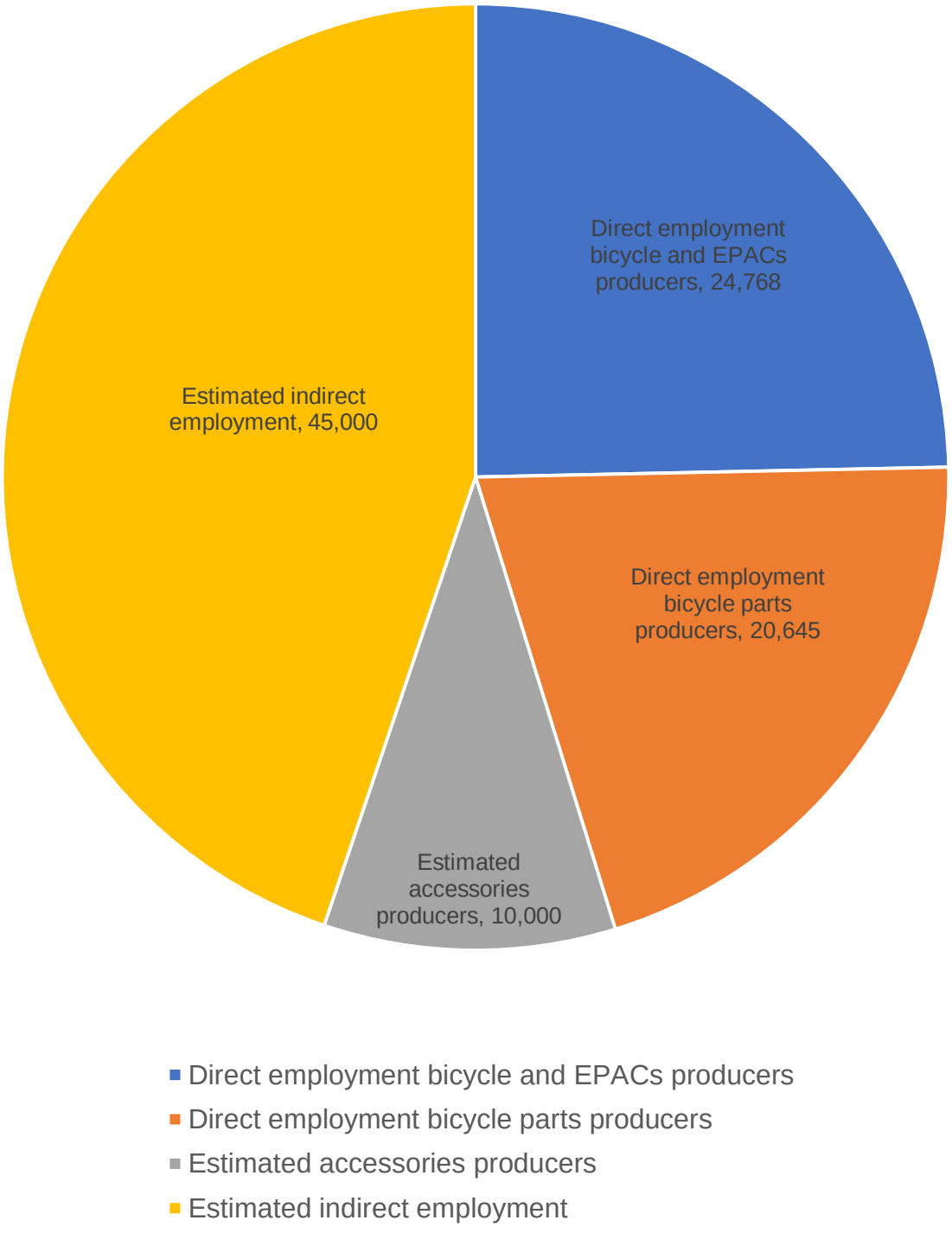
5) We must underline as well that - in case the EU bicycles Producers would be put out of business by the subsidized PRC's dumping - the whole production of high-tech EPACS (Electrically Pedalling-Assisted Cycles) and E-bikes will disappear in Europe, to be absorbed by the Chinese exporters. It would no longer be economically viable to produce only Pedal-Assist E-bikes in Europe, without the Bicycles 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 Bicycles and Parts' Industries.
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 the EU 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.
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.

6) Also in the downstream there would be loss of jobs, especially at the dealers' level (totally we have in Europe more than 50.000 cycle retailers, for an estimated workforce of 150.000 Workers: indeed one of the main reasons that the EU Users (ECF represents millions of cyclists) are in favor of the antidumping on Bicycles is precisely the menace of poor quality and the loss of service at 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 confirming to your kind attention our deep alarm that over 90.000 EU skilled Workers of one of th emost important Green Industries' Employer 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 high tech automations.
We underline the ecological sustainability of the EU bicycle Industry. This industry adopts the latest technologies of non-pollution production (for istance 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 are at zero km Co2 emissions (compared to Chinese exported bicycles, which cost from 61 to 123 kgs of emmissions more than) to the EU users, as confirmed by the attached document of the European Cyclists Federation.
In the December 2012 study, we confirmed that the EU Bicycles and Parts Industries would have invested heavily in the next 5 years to modernize the technical equipment, to develop new products and to repatriate and adopt productions like frames, forks, handle bars, stems which are currently produced and subsidized in China: this effort is confirmed, our Industry is investing one Billion Eu per year, also creating "Bike Valley" projects in different EU Industrial Districts such as Romania, Belgium/Flanders, Portugal (attached the Bike Europe articles).

Employment (direct) in EU bicycle, EPACs and parts industry

Country	Bicycles and EPACs producers			Parts producers			Total employees per country	Total Investments/ Innovations 2016 (mill EUR) per country
	No. of companies	Employees	Investments/ Innovations 2016 (mill EUR)	No. of companies	Employees	Investments/ Innovations 2016 (mill EUR)		
Austria	1	300	0.562				300	0.562
Belgium	15	320	3.65	13	293	2.900	613	6.550
Bulgaria	8	1,860	7.07	1	65	0.060	1925	7.130
Croatia							0	0.000
Cyprus	0	0	0	0	0	0.000	0	0.000
Czech Republic	14	597	4.65	39	1,890	10.000	2487	14.650
Denmark	7	106	1.10	4	30	0.250	136	1.350
Estonia	1	5	0	0	0	0.000	5	0.000
Finland	7	428	2.65				428	2.650
France	12	780	23.85	30	1,751	30.580	2531	54.430
Germany	39	3905	116.90	60	5,573	464.250	9478	581.150
Greece	3	202	1.00	2	640	0.000	842	1.000
Hungary	11	1,034	10.70	16	530	3.000	1564	13.700
Ireland	2	14	0.00				14	0.000
Italy	112	3287	44.00	111	2,417	42.200	5704	86.200
Latvia	4	29	0.30	0	0	0.000	29	0.300
Lithuania	1	600		0	0	0.000	600	0.000
Luxembourg	0	0	0	0	0	0.000	0	0.000
Malta	0	0	0	0	0	0.000	0	0.000
Netherlands	20	2,280	49.20	36	1,071	35.250	3351	84.450
Poland	60	4873	54.33	11	420	3.700	5293	58.030
Portugal	23	1137	29.886	63	4,024	52.461	5161	82.347
Romania	4	1350	13.00	4	1,100	10.000	2450	23.000
Slovakia	15	443	1.00	10	189		632	1.000
Slovenia	1	15	0.10	1	70	0.250	85	0.350
Spain	12	609	3.85	9	322	4.350	931	8.200
Sweden	4	147	1.60	4	40	1.500	187	3.100
United Kingdom	8	447	6.80	9	220	2.200	667	9.000
TOTAL	**384**	**24,768**	**376.198**	**423**	**20,645**	**662.951**	**45,413**	**1,039.149**

EMPLOYMENT EUROPEAN BICYCLE INDUSTRY



EU BICYCLE INDUSTRY's GREEN EMPLOYMENT AND INVESTMENTS / INNOVATION STUDY

in 2018

Update March 2019

OPEN VERSION

CONEBI
Bd. de la Woluwe 46 b16
1200 Brussels
Belgium

EBMA
Rue Archimede 77, Boile 64, Apt. 7D
1000 Brussels
Belgium

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 C02 & 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 approximatively 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 istance 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 emmissions 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 developping 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 Sustainbale Manufacturing SMEs and very capable Workers.

Very best regards

Moreno Fioravanti
EBMA-European Bicycle Manufacturers Association
+32471548018
www.ebma-brussels.eu

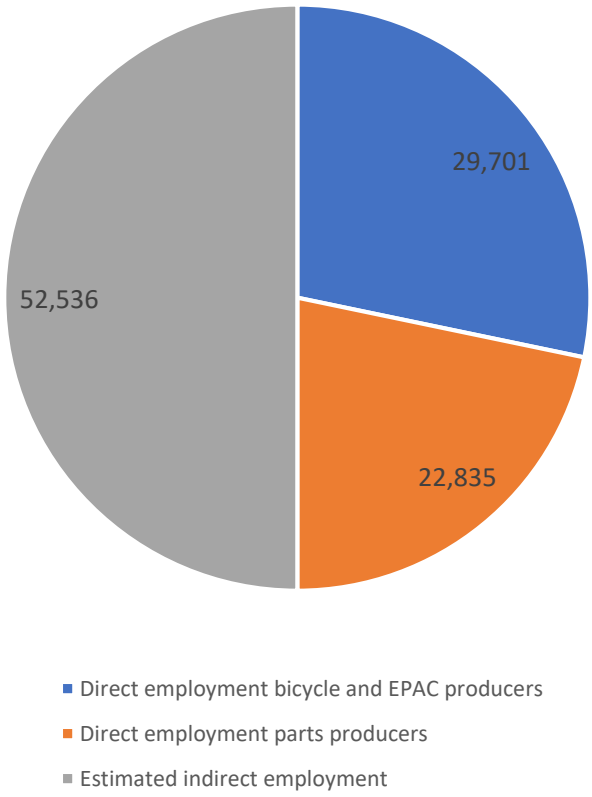
2018 data, last updated in March 2019 (OPEN VERSION)

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 (mill EUR)	No. of companies	Employees	Investments/ Innovations in 2018 (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	242	1.90	41	1,911	12.30	2,153	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	1,449	60.35	17	580	3.50	2,029	63.85
Ireland	5	17	0.20	-	-	-	17	0.20
Italy	111	3,514	43.30	90	2,564	41.80	6,078	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	5,613	65.65	12	430	4.05	6,043	69.70
Portugal	25	1,485	30.16	65	4,248	54.77	5,733	84.93
Romania	4	1,140	10.50	10	1,227	11.00	2,367	21.50
Slovakia	12	500	3.00	9	161	1.40	661	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
TOTAL	**407**	**29,701**	**379.51**	**415**	**22,835**	**667.45**	**52,536**	**1046.96**

2018 data, last updated in March 2019 (OPEN VERSION)

EMPLOYMENT EUROPEAN BICYCLE INDUSTRY



EU BICYCLE INDUSTRY's GREEN EMPLOYMENT AND INVESTMENTS / INNOVATION STUDY

in 2021

Updated 18th May 2022

OPEN VERSION

CONEBI
Avenue Marnix, 17
1000 Brussels
Belgium

EBMA
Rue Archimede 77, Boile 64, Apt. 7D
1000 Brussels
Belgium

Dear Madam/Sir,

Please kindly find enclosed the latest results of our research for our EU Bicycles, Ebikes and Components Industry in Europe.

After the first study of December 2012, the second one in December 2016, and the third one in March 2019, this December 2021 update is very important, as it is underlining the current expansion of our EU Bicycles, Ebikes & Components Industry both in Green jobs, investments/innovations 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 Co2 & sulphuric dioxides emissions, and create good long-term industrial Green jobs locally for our younger generations, is to help and defend the development of EU Manufacturing SMEs. We are one of the largest E mployers 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 more than 155.000 Workers Direct-Indirect, and more than 1000 SMEs capillary distributed in 24 of the 27 EU Member States+UK, generating approximatively 1.8 Billion EU investments/innovations and approximatively 20 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 2023 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 60%) 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 1000 SMEs with a direct workforce of approximately 80.000 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 75.000 Green jobs upstream are involved, in many industrial districts of the 27 MS+UK. 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 Green 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) disappear in Europe, to be absorbed by the Chinese exporters. It would not be economically viable to produce only 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 ITS 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 Green 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 155.000 EU skilled Workers of one of the most important Green Industries' are at risk to lose their Green jobs without the current antidumping and antisubsidies 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 istance water-based paint, while the PRC's exports are adopting very dangerous paint contents like LEAD or Calmium, 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 emmissions more than manufactured in the EU, as confirmed by the study of the Milan Politechnico.
This means that if all 20 million bicycles & pedal assist 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. PRC - already the largest polluter in the World - at the COP 26 has been pretending to be treated as a developing Country, in order to still adopt until 2060 coal based energy and coal based steel and aluminum production. The result will be that the largest pollution emission in history will even further: the giant dimension of the coal based Co2 emissions can easily be checked in this pollution radar map.

In the 2016 study, we confirmed that the EU Bicycles, Pedal Assist Ebikes and Components Industry would have invested heavily in the following 5 years to modernize and enhance the technical and environmentally-friendly equipment, to develop new and greener products and to reshore and adopt substainable production of frames, forks, handle bars, stems which are currently produced with high emissions and subsidized in China. Indeed, our Industry has been investing since then over one Billion Euro per year, also creating "Bike Valley" projects in different EU Industrial Districts such as Romania, Belgium/Flanders, Portugal (see here).
In 2021, as confirmed by this investments/innovations study the EU Bicycles, Pedal Assist Ebikes and Components Industry has been investing approximately 1.8 Billion euro: a really great achievement!

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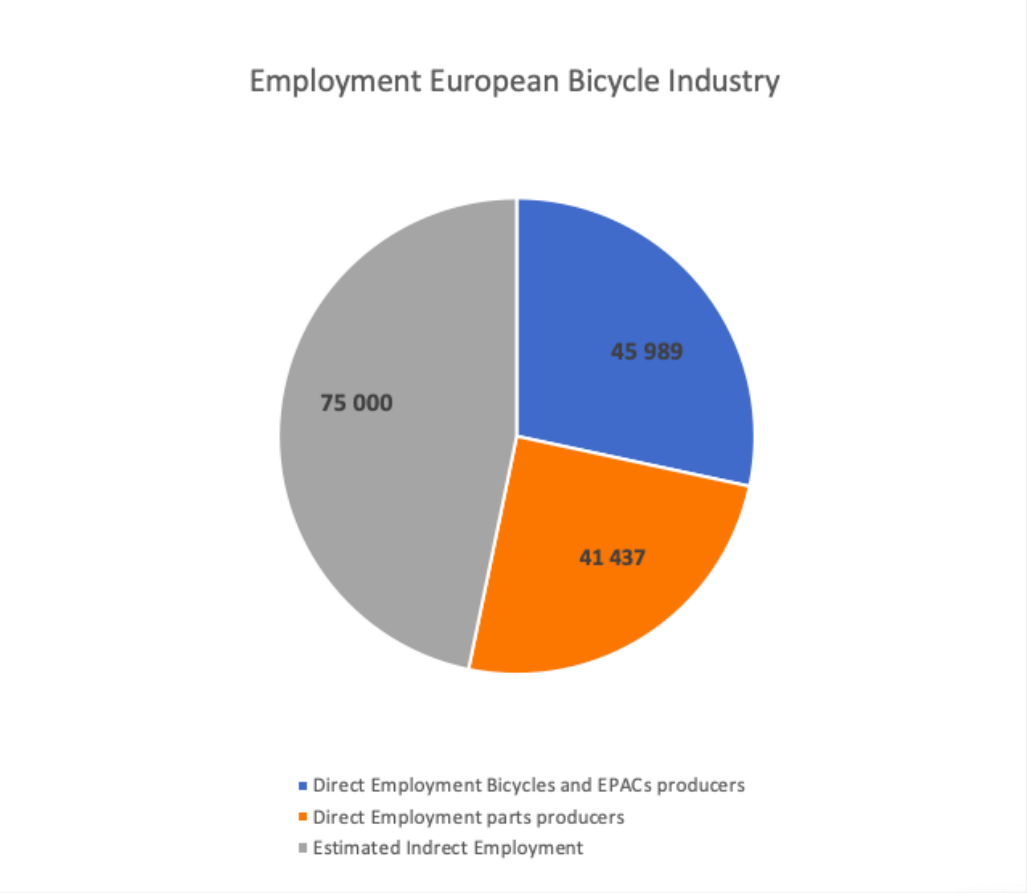
Employment (direct) and investments in EU Bicycle, EPACs and Parts Industry

Country	Bicycle and EPAC producers			Parts Producers			Total No. of companies	Total Direct Green Jobs per country	Total Direct and Indirect Green Jobs per country	Total Investments/ Innovations in 2021 (Mill EUR) per country
	No. Of companies	Employees	Investments/ Innovations in 2021 (mill EUR)	No. Of companies	Employees	Investments/ Innovations in 2021 (mill EUR)				
Austria	5	628	8.31	3	31	0,66	8	659	1 000	8.97
Belgium	21	712	16.48	13	338	9,83	34	1 050	2 100	26.31
Bulgaria	10	2 210	19.33	1	261	1	11	2 471	4 000	20.33
Croatia	2	112	1.2	-	-	-	2	112	200	1.2
Cyprus	-	-	-	-	-	-		-		-
Czech Republic	20	1 309	20.74	43	2 767	42,425	63	4 076	8 000	63.165
Denmark	17	357	8.511	3	47	1,44	20	404	800	9.951
Estonia	1	10	0.15				1	10	20	0.15
Finland	5	94	3.5	2	112	2	7	206	400	5.5
France	37	2 518	69.099	37	2 193	50,732	74	4 711	9 100	119.831
Germany	100	7 992	341.89	95	18 337	493,05	195	26 329	45 000	831.94
Greece	3	237	6.3	3	815	9,7	6	1 052	2 000	16
Hungary	7	1 763	38.03	15	1 021	18,33	22	2 784	5 400	56,36
Ireland	5	14	0.21	-	-	-	5	14	30	0.21
Italy	130	11 600	132.525	106	3 901	68,233	236	15 501	26 000	200.758
Latvia	3	50	0.72	-	-	-	3	50	100	0.72
Lithuania	1	566	1	-	-	-	1	566	1 100	1
Luxembourg	-	-	-	-	-	-		-		-
Malta	-	-	-	-	-	-		-		-
Netherlands	45	3 951	81.41	37	1 565	41,53	82	5 516	11 000	122.94
Poland	73	6 188	89.183	14	898	13,48	87	7 086	13 000	102.663
Portugal	28	1 950	25.69	66	6 050	49,53	94	8 000	14 200	75.22
Romania	4	1 158	16	10	1 939	19,8	14	2 805	5 500	35.8
Slovakia	13	562	7.31	11	179	2,2	24	741	1 400	9.51
Slovenia	2	30	0.33	1	84	2,5	3	94	180	2.83
Spain	20	1 129	26.885	12	552	6,36	32	1 681	3 200	31.245
Sweden	6	197	2.07	1	10	0,7	7	207	180	2.77
United-Kingdom	10	652	8	12	337	5	22	989	1 400	13
Total	**568**	**45 989**	**924,873**	**485**	**41 437**	**838.500**	**1053**	**87 426**	**155 000**	**1.764.000**


Employment European Bicycle Industry
45 989
41 437
75 000
Direct Employment Bicycles and EPACs producers
Direct Employment parts producers
Estimated Indirect Employment