

GLOBAL BICYCLE PURCHASING INDEX (GBPI)

PRESS CONFERENCE



GBPI

GLOBAL BICYCLE PURCHASING INDEX

A JOINT INITIATIVE BY



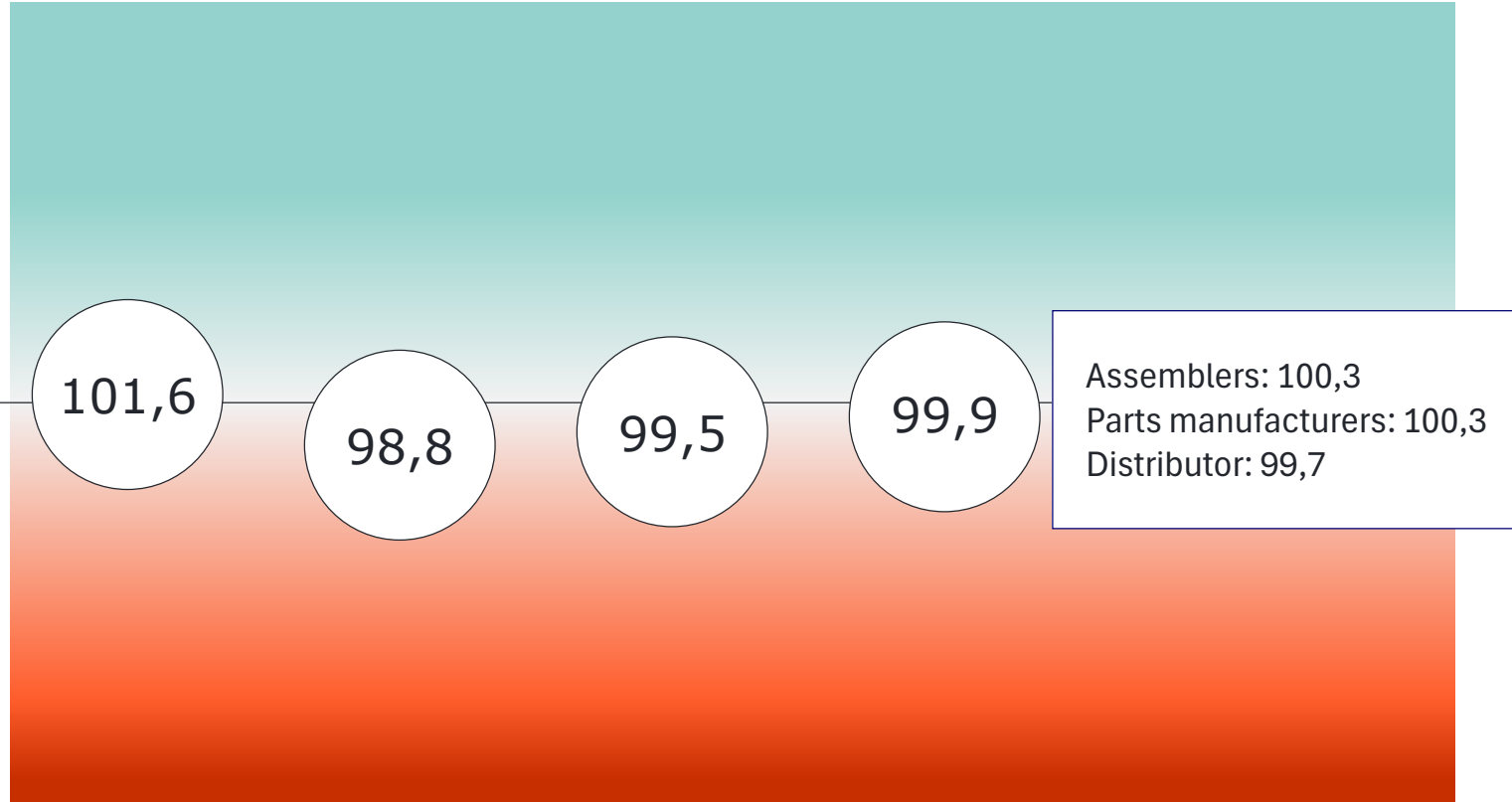
IFH KÖLN

June, 2026

IFH KÖLN, March 2026



THE MOOD IN THE INDUSTRY REMAINS SUBDUED



Wave 1
June 25

Wave 2
Oct/Nov 25

Wave 1
Feb/Mar 26

Wave 2
May/June 26



A JOINT INITIATIVE BY



fx

Composition of the Index

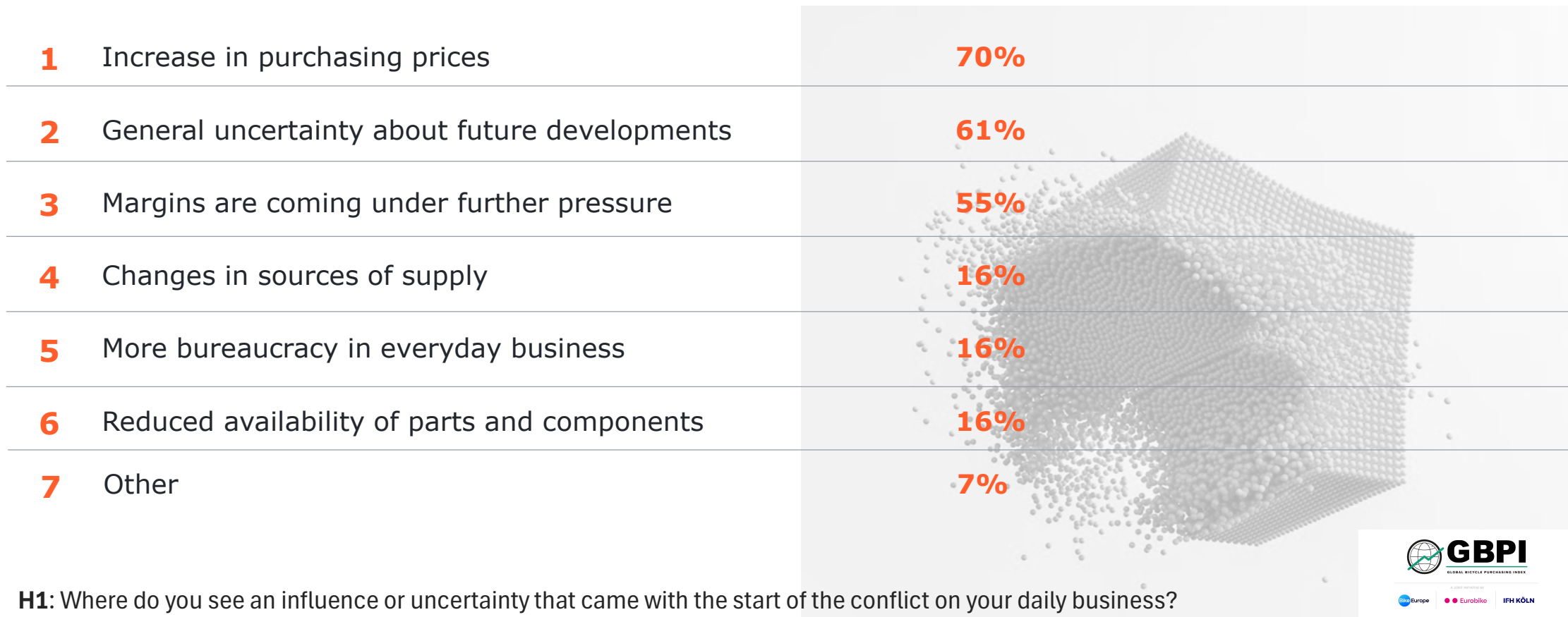
A total of 8 items on the (current/future) situation of the industry and your own company are included in the index

Calculation of the Index

100 + sum(Q1.a mean index values + ... + Q2.e/f/g mean index values)

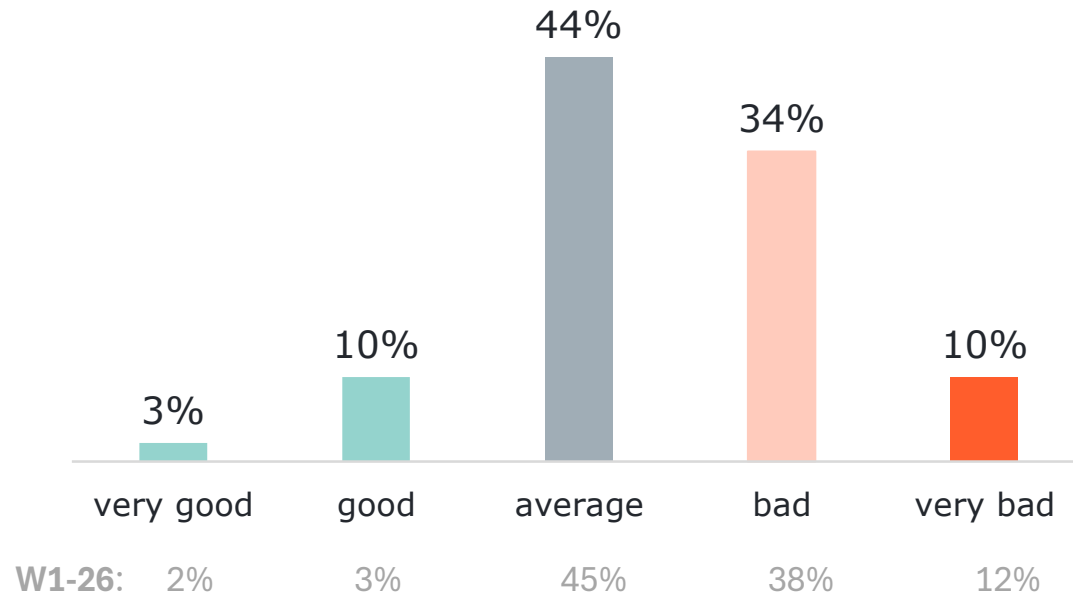
GLOBAL CONFLICTS ARE INCREASING UNCERTAINTY

The unexpected start of the U.S.–Iran conflict on 28 of February added an extra dimension to the geopolitical tensions and ongoing supply chain uncertainties. What are the potential influences or uncertainties?



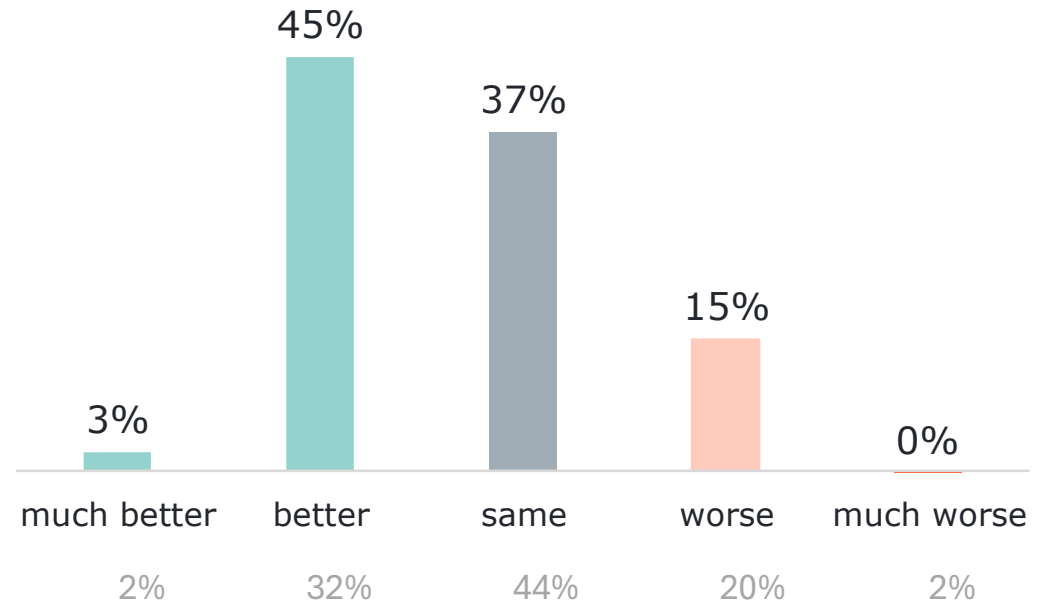
BUT: THERE ARE SIGNS OF IMPROVEMENT – IN THE BUSINESS CLIMATE ...

Current Situation of the **Industry**



Q1.a: In general, how do you rate the current situation in the bicycle industry?

Short-Term Expectations of the **Industry**

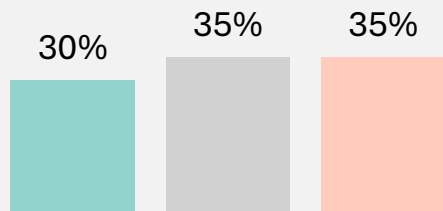


Q1.b: How do you think the situation in the bicycle industry will develop this quarter compared to the same quarter last year?

... AND IN SOURCING

If bike assembler:
Own Purchasing Levels
of parts & components

- increased (significantly)
- the same
- decreased (significantly)

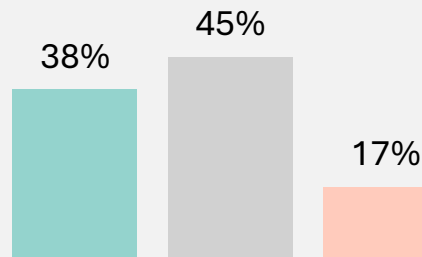


35%
W1 26

30%
W1 26

If parts & components manufacturer:
Own Purchasing Levels
of raw and semi-finished materials

- increased (significantly)
- the same
- decreased (significantly)

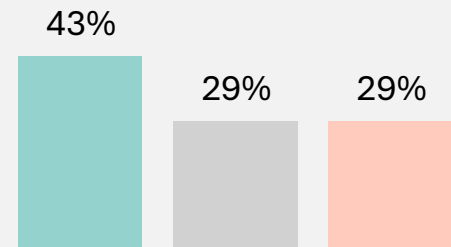


31%
W1 26

31%
W1 26

If distributor:
Own Purchasing Levels
of bikes

- increased (significantly)
- the same
- decreased (significantly)



30%
W1 26

46%
W1 26

Q2.e: (if bike assembler): How has your company's purchasing levels for parts & components changed this quarter compared to the same quarter last year? **Q2.f:** (if parts & components manufacturer): How has your company's purchasing levels for raw and semi-finished materials changed this quarter compared to the same quarter last year? **Q2.g:** (if distributor): How has your company's purchasing levels for bikes changed this quarter compared to the same quarter last year?

IN TIMES OF CRISIS, PEOPLE SEEK CONNECTION

In the current global environment, **how relevant are the following channels for your sourcing and purchasing strategy?**

Share “highly/very relevant” in%

- 1** Personal networks **73%**
- 2** Direct supplier visits **68%**
- 3** International trade fairs **44%**
- 4** Industry media **40%**
- 5** Regional trade fairs **32%**
- 6** Digital sourcing platforms **31%**
- 7** Industry associations **23%**
- 8** Webinars / online conferences **21%**