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Welcome to  
**EUROBIKE 2026**

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# EUROBIKE Media Breakfast

in Partnership with pressedienst  
fahrrad



# Press Conference

Philipp Ferger, CEO Fairnamic

Dr. Ralf Deckers, Member of the Executive Board at IFH Cologne

Isabell Eberlein, CEO Velokonzept and Women in Cycling Germany

Hannes Neupert, Expert in the field of LEV and Renewable Energies

Frank Puscher, Moderator

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**Philipp Ferger,**  
CEO Fairnamic

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## **INTERNATIONALE B2B LEITMESSE IN FRANKFURT SEPTEMBER, 2-JÄHRIG**

INTERNATIONAL LEADING B2B  
TRADE FAIR IN FRANKFURT,  
HELD BIENNIALLY IN SEPTEMBER

## **INTERNATIONALE MESSEN**

INTERNATIONAL  
TRADE FAIRS

# B2B



# B2C

## **UNTERJÄHRIGE, REGIONALE B2C FORMATE**

REGIONAL B2C EVENT  
FORMATS HELD  
THROUGHOUT THE YEAR

## **GANZJÄHRIGE DIGITALE CONTENT-PLATTFORM, #365**

YEAR-ROUND DIGITAL  
CONTENT PLATFORM (#365)

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- Biennial B2B event
- Additional B2C format – details to follow
- New cost structure/reduction
- International partner network

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- Innovation platform
- New participation options and packages
- New start-up area

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# EUROBIKE 2027 FLOOR PLAN / GELÄNDEPLAN

## EXHIBITION AREA / AUSSTELLUNGSFLÄCHE

**BIKES & PARTS\*** **Hall 3.0/3.1**  
Halle 3.0/3.1

Hall 3.0: Brands Complete Bikes (Urban & Performance)  
Hall 3.1: Parts, Accessories, Apparel and Open Stage  
*Halle 3.0: Brands Komplettträger (Urban & Performance)*  
*Halle 3.1: Teile, Zubehör, Bekleidung und Open Stage*

**SUPPLIERS & SOURCING\*** **Hall 4.0/4.1**  
Halle 4.0/4.1

Hall 4.0: Sourcing with suppliers from Europe and the U.S.  
Hall 4.0: Europe Hall: Presentations  
Hall 4.1: Global sourcing with international suppliers from the rest of the world  
*Halle 4.0: Sourcing mit Anbietern aus Europa, USA*  
*Halle 4.0: Saal Europa: Vorträge*  
*Halle 4.1: Sourcing global mit internationalen Anbietern aus dem Rest der Welt*

**TRENDS & VISIONS\*** **Hall 5.0**  
Halle 5.0

Ecomobility (Light Electric Vehicles/Scooters),  
Mobility Infrastructure + Open Stage (AT)  
*Ecomobilität (Leichte Elektrofahrzeuge/Scooter),  
Mobilitätsinfrastruktur + Open Stage (AT)*

**HALL 2.0 & FORUM (OPTIONAL) FOR ACTIVITIES AND EVENTS\*** **Hall 2.0/Forum**  
Festhalle/Forum

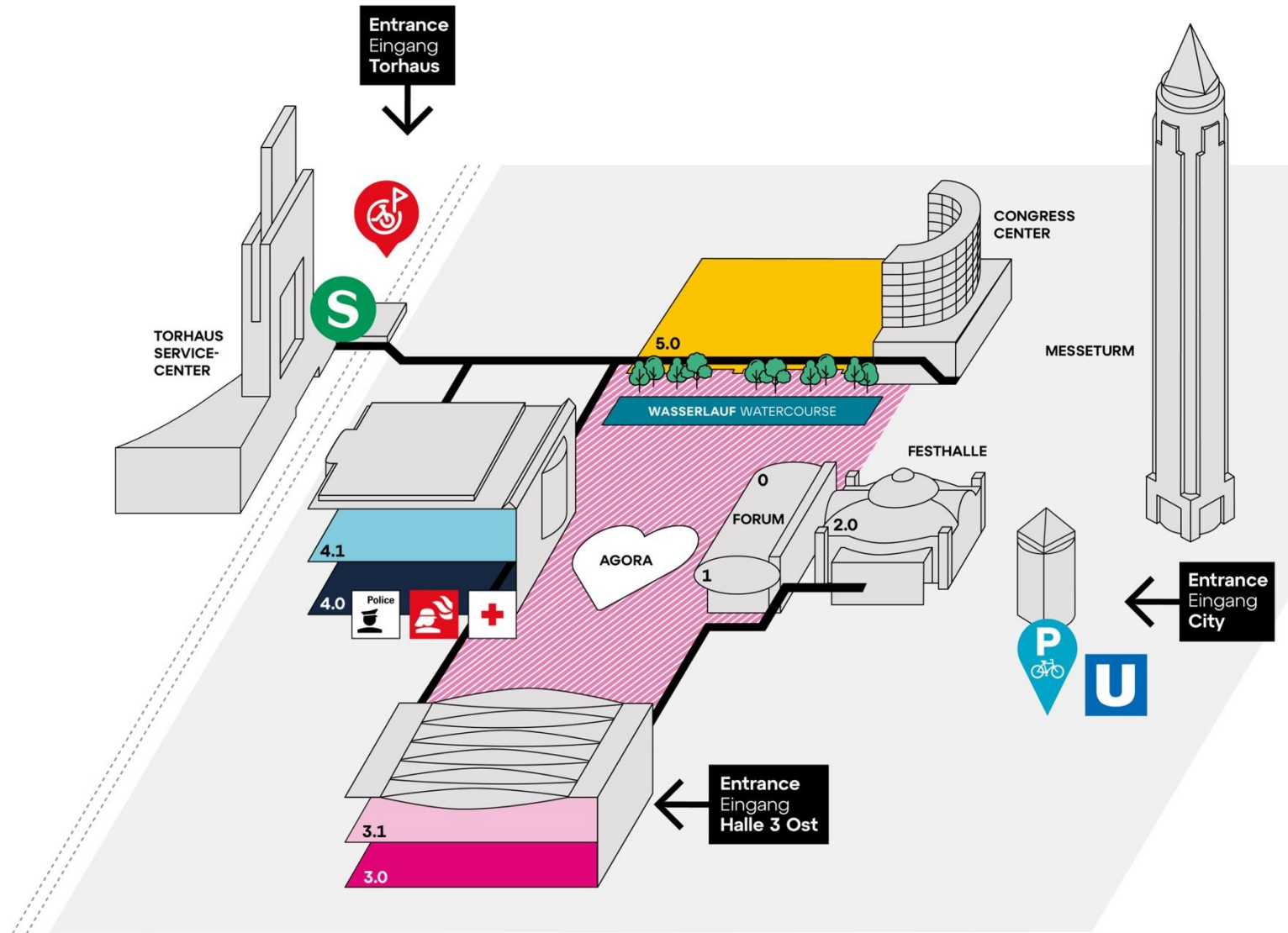
*Festhalle & Forum (optional) für Aktionen und Events*

*\*work in progress, together with advisory board*

## OPEN AIR GROUNDS / FREIGELÄNDE

**CONNECT & EXPLORE** **Agora**  
Agora

Central square as the centerpiece of the EUROBIKE Experience, featuring promotional areas and test areas  
*Zentraler Platz als Herzstück der EUROBIKE Experience mit Aktionsflächen/Testareas*



DB Call a Bike Stations  
DB Call a Bike Stationen

Bicycle parking: at Entrance City  
Fahrradparkanlagen: am Eingang City

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**Dr. Ralf Deckers,**

Member of the Executive Board at IFH Cologne

# GLOBAL BICYCLE PURCHASING INDEX (GBPI)

PRESS CONFERENCE



# GBPI

GLOBAL BICYCLE PURCHASING INDEX

A JOINT INITIATIVE BY



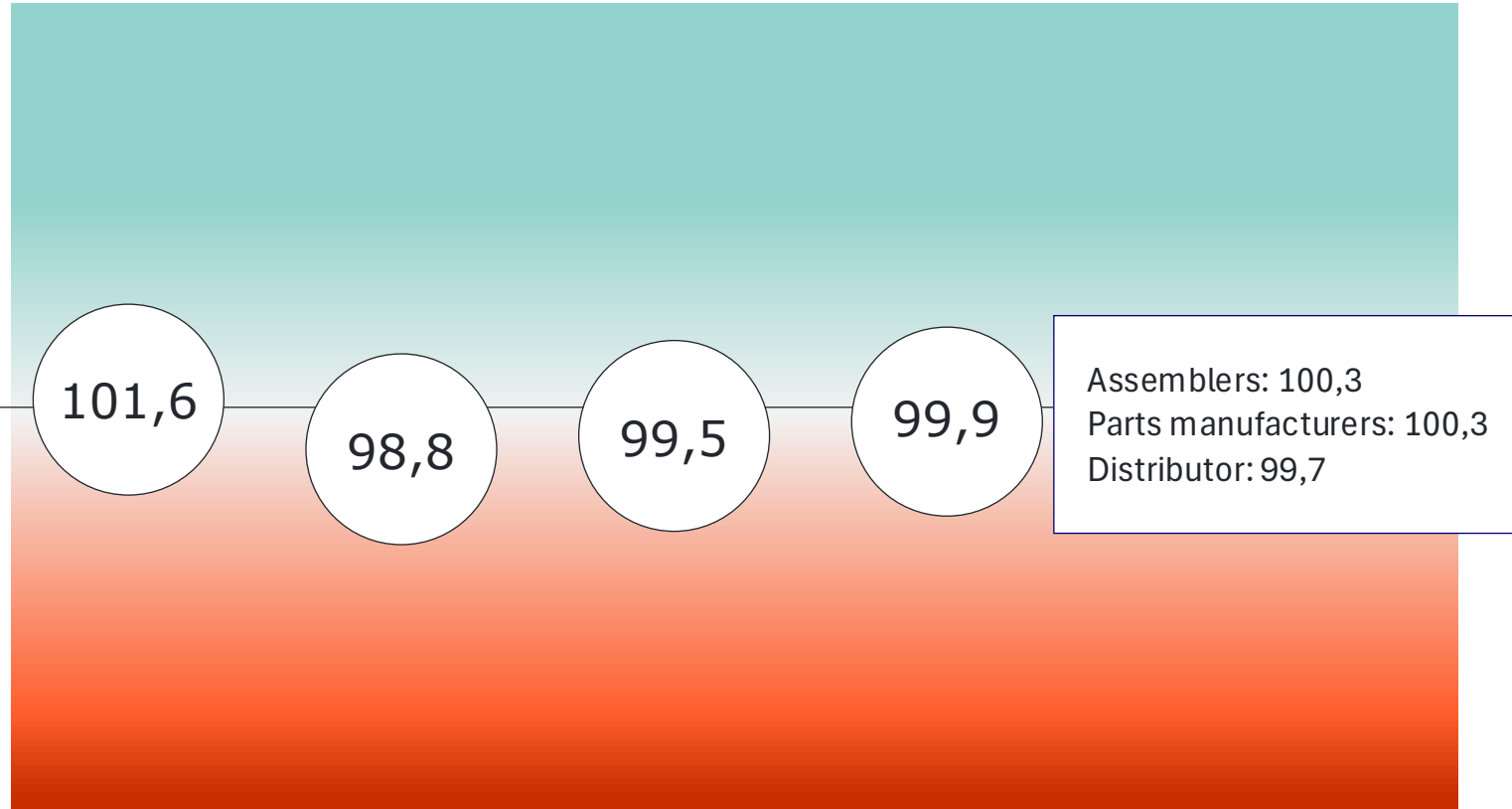
IFH KÖLN

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

Assemblers: 100,3  
Parts manufacturers: 100,3  
Distributor: 99,7



A JOINT INITIATIVE BY



*fx*

## Composition of the Index

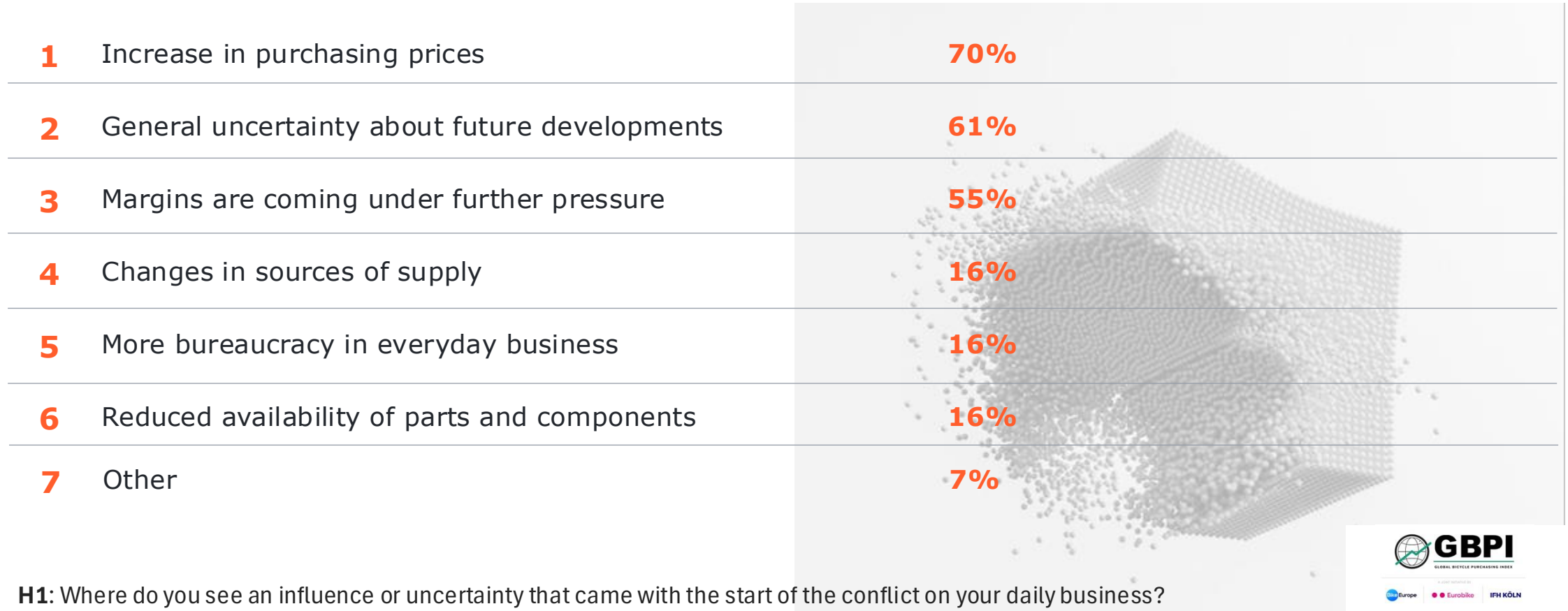
A total of 8 items on the (current/future) situation of the industry and your own company are included in the index

## Calculation of the Index

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

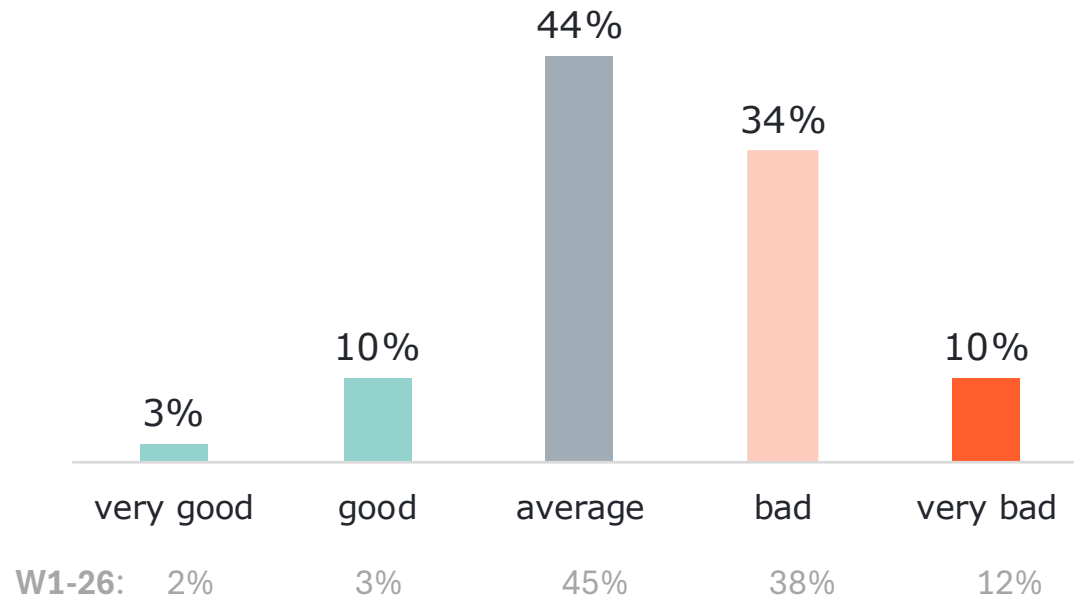
# GLOBAL CONFLICTS ARE INCREASING UNCERTAINTY

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?



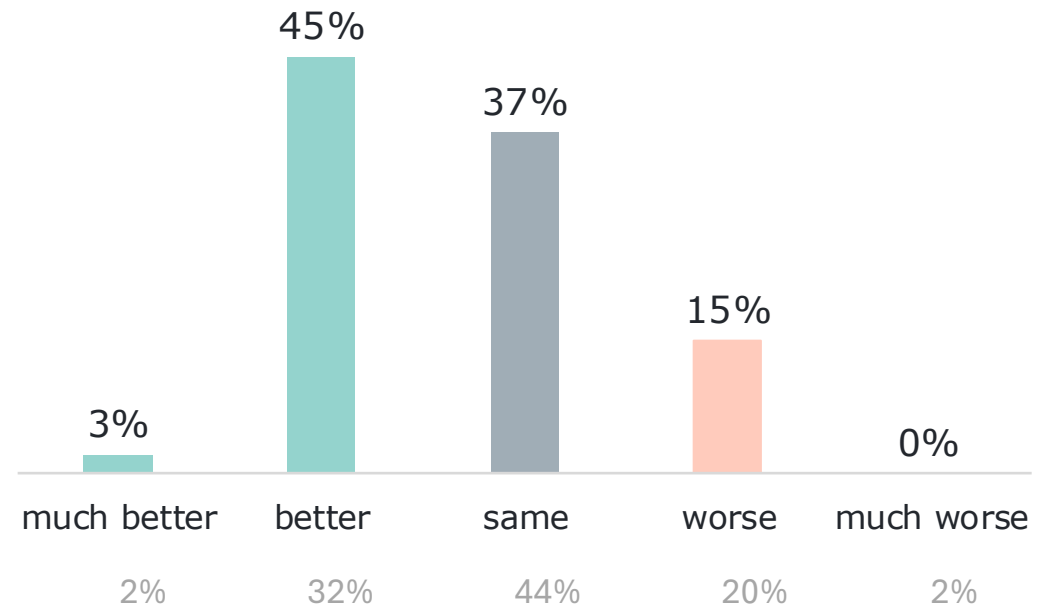
# BUT: THERE ARE SIGNS OF IMPROVEMENT – IN THE BUSINESS CLIMATE ...

## 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**

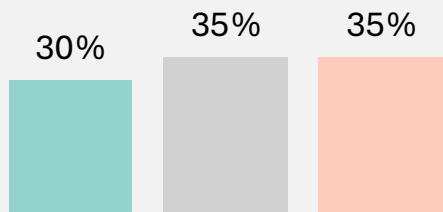


**Q1.b:** How do you think the situation in the bicycle industry will develop this quarter compared to the same quarter last year?

# ... AND IN SOURCING

## If bike assembler: Own Purchasing Levels of parts & components

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

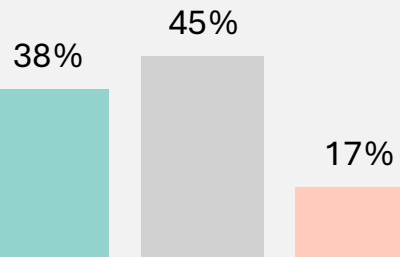


**35%**  
W1 26

**30%**  
W1 26

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

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

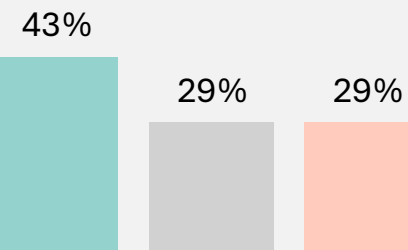


**31%**  
W1 26

**31%**  
W1 26

## If distributor: Own Purchasing Levels of bikes

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



**30%**  
W1 26

**46%**  
W1 26



Europe Eurobike IFH KÖLN

**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%**

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**Isabell Eberlein,**

CEO Velokonzept and Women in Cycling  
Germany



# Women - the underrated growth driver

Study on the economic potential of women in the German bicycle market

Frankfurt, 23.06.2026

in cooperation with

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**IFH KÖLN**

# Women - the underrated growth driver

Study on the economic potential of women in the German bicycle market



Sponsored by



Conducted by

**IFH KÖLN**

Database: Re-analysis  
of surveys of female  
cyclists in Germany

Commissioned by Women in Cycling Germany



## The industry needs growth impulses

The overall market stagnates - while a decisive target group is systematically underestimated

**€12.2 bn**

Total market DE 2025  
(projection)

**0% CAGR**

IFH growth forecast to  
2030 (total market)

**-4.6% 2025**

Bicycle market volume  
decline vs. prior year



Post-pandemic revenues are declining, margins under price pressure.  
New target groups are the only path to growth.

### Price pressure

Ø Avg. e-bike price 2025: €2.550 (peak 2023: €2.950)

### Competitors

43% of low-price platform buyers purchase leisure & hobby – new target groups are a strategic necessity, not a nice-to-have

# Women generate €4.46 bn - and are still underrated



Despite making up 51% of the population, women account for only 38% of bicycle segment revenues

**€4.46 bn**

Current women's total market volume

**51% pop.**

Women's share of the population

**> 1/3 mkt.**

Women's share of total market volume

## Women's revenue share per product category (Benchmark: 51% population share)





## Up to €950 m additional potential by 2030

Depending on scenario, €520 mn to €950 mn in additional revenues are achievable across the total market.

### LOWER SCENARIO

**+ €520 mn**

**+2% p.a.** Full market incl. accessories, clothing, service

### MID SCENARIO

**+ €740 mn**

**+3% p.a.** Full market incl. accessories, clothing, service

### UPPER SCENARIO

**+ €950 mn**

**+4% p.a.** Full market incl. accessories, clothing, service



Bicycles only (excl. accessoires/service: up to + €570 mn)

Additional revenue potential by 2030 – depending on activation level (IFH KÖLN estimate)



## Five types - one clear message

~50% of all women: Safety-Seeking + Service-Oriented = high, immediate activation potential

### 18% Passion Driven

Highly involved, enthusiastic frequent female drivers with a strong affinity for technology, brands, and performance.

high potential

### 26% Safety Seeking

Motivated everyday female drivers who are held back by safety concerns and infrastructure limitations.

high potential

### 23% Service Oriented

Active everyday female drivers who rely heavily on support and guidance.

### 9% Inconsistent

Everyday female drivers with situational usage patterns and a lack of commitment and prioritization.

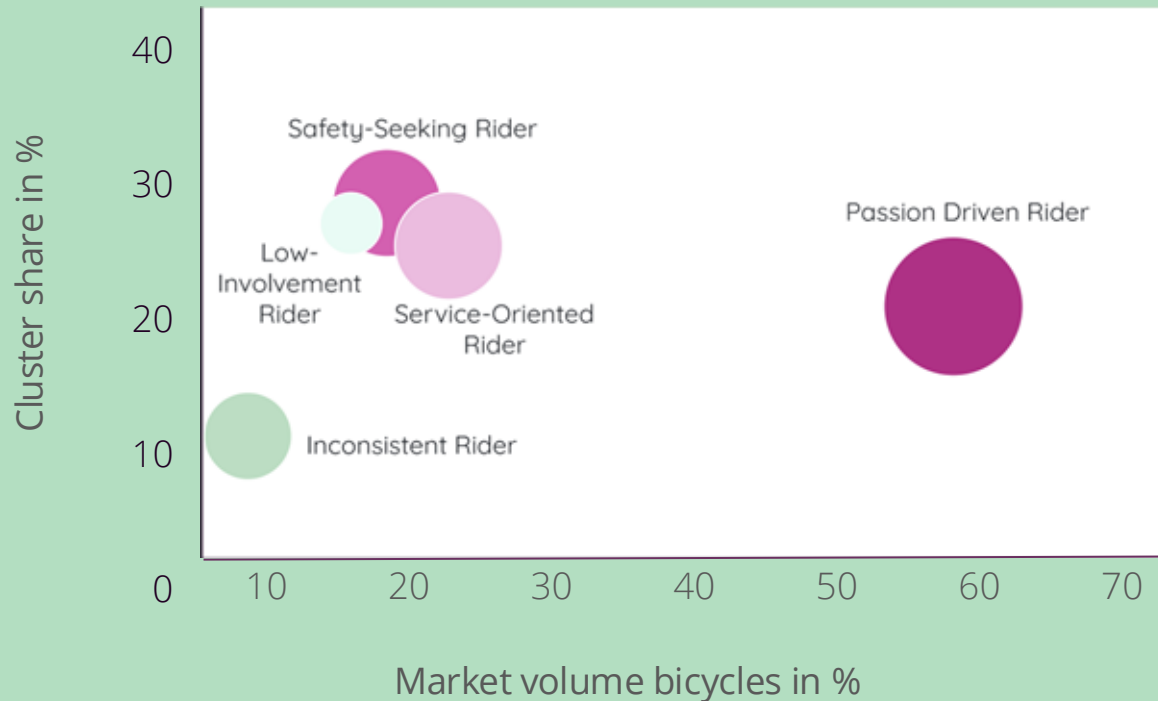
### 24% Low Involvement

Rationally minded occasional users for whom it has no real relevance in everyday life.



# Potential for Safety-Seeking + Service-Oriented

Both target groups are among the most common segments, but they contribute disproportionately little to the overall market volume



Market volume bicycles 2025\*  
in mn EUR

Passion Driven Rider	1.460
Safety-Seeking Rider	360
Service-Oriented Rider	480
Inconsistent Rider	90
Low-Involvement Rider	290

Women total: 2.680

Source: IFH KÖLN \* estimation

The size of the squares symbolizes the engagement level regarding cycling (measured on frequency of usability and emotional attachment)



## What really drives women

Safety, trust, and everyday usability are the decisive levers.

**49%**

feel unsafe cycling in road traffic (vs. 33% men)

**56%**

cite safety as an important purchase criterion (vs. 37% men)

**51%**

get information from family and friends: personal trust is decisive

**48%**

prioritise optimal body fit when purchasing (vs. 36% men)



## Four levers for industry and retail

Significant growth potential can be actively and systematically unlocked by the industry.



### Communicate safety

Position safety features as concrete everyday benefits, not technical details. 56% cite safety as a purchase criterion.



### Retail as trust anchor

Individual consultation, dedicated contact persons, and community formats build long-term customer relationships.



### Holistic Customer Journey

Think bike + accessories + service as one integrated solution. Large potentials lie along the entire journey.



### Make leasing visible

31% of women with leasing access don't know the terms. More flexible models and better information unlock new demand.

# Winning women = winning the market

Turning insights into action



1

Women are not a low-interest group – they are a high-barrier group.

2

Growth is in the industry's hands – levers are known and actionable.

3

Together: industry, retail and network partners can unlock up to €950m in additional revenue potential.

*\* Theoretical maximum potential with full equalisation of consumption levels: €3.3 bn (IFH KÖLN)*

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**Hannes Neupert,**

Expert in the field of LEV and Renewable Energies



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# Thank you for your attention!

Join our *Media Tour* at 11:00 a.m.



**Presskit  
German**



**Presskit  
English**