

ZIV sees signs of recovery in German bicycle market

Frankfurt am Main, 24.06.2025 | On the eve of this year's Eurobike trade fair, the ZIV has presented its market data for the German bicycle industry for the first quarter of 2025. «An improved mood with continued economic stability currently prevails in the bicycle market, among both the bicycle industry and retailers of bicycles, bikes parts and bike accessories,» tells the ZIV's CEO, Burkhard Stork. «We're seeing countless signs that business in our industry will normalise from 2026. That being said, the increase in sales should still be viewed with a little caution for the time being,» reminds Stork in the run-up to the world's leading trade fair for all things bicycle related.

Sales According to the ZIV, sales in the German bicycle market to end customers were higher in the first quarter of 2025 than in the previous year. By the end of March, 385,000 bicycles had been sold – that's 10% more than in the first quarter of 2024 (350,000 units). E-bike sales also rose by around 11% year-on-year to 500,000 units (Q1/2024: 450,000 units). Overall, bicycle and e-bike sales grew almost 11% to a total of 885,000 units in the first quarter of this year (Q1/2024: 800,000 units).

The ZIV's data shows somewhat fewer sales again in April and May, hence the year-on-year increase for spring as a whole (up until the end of May) is only around 5%. Good sales in recent months have further reduced stock levels, above all in the retail sector, but also within the industry. Demand for sports bikes (particularly racing bikes and gravel bikes) also remains good to very good. In the e-bike segment, mountain bikes with electric assistance were once again in high demand at the start of this year.

Production According to the ZIV, German manufacturers produced around 520,000 e-bikes in the first quarter of 2025. That is almost 16% more than in the previous year. In the same period, a total of 240,000 bicycles were produced, so almost 10% more than in 2024. 760,000 bicycles and e-bikes were produced in total, which amounts to almost 13.5% more than in the same period in the previous year (Q1/2024 670,000 units). «The same applies here: the first three months in a year can only serve as an indicator for an annual forecast to a limited extent, as pre-production for the upcoming season usually takes place during this period,» emphasises Burkhard Stork. «Our prognosis of a slight increase compared to the previous year remains unchanged, however. We have made it through the lowest point.»

Exports/imports

In the first quarter of 2025, around 182,000 bicycles were exported from Germany. That is almost 25% more than during the same period last year (146,000 units). E-bike exports also increased: 156,000 units were exported, so almost 7% more than the same period in 2024 (146,000 units). Overall, bicycle and e-bike exports increased by around 16% (338,000 units) compared to the same period in the previous year (292,000 units).

In the first quarter of 2025, 439,000 bicycles and 202,000 e-bikes were imported – a plus of around 30% and 24% respectively compared to the same period in 2024 (bicycles: 339,000 units; e-bikes: 163,000 units). Imports thus increased by almost 28% overall (640,000 units) in the first quarter of the year compared to the previous year.

Outlook

The ZIV expects the situation to remain tense for manufacturers and retailers of bicycles and e-bikes, bike parts and bike accessories this year. «We remain on course for a normalisation of the bicycle market. We're seeing light at the end of the tunnel for 2026 and thus clear signs of the end to a difficult phase,» says Burkhard Stork.

At the same time, Stork stresses that the comparative period was very weak in 2024, which is why the double-digit growth figures cannot yet be taken as confirmation that the market is normalising. The market recovery greatly hoped for at the start of the year could not be continued in April and May 2025, hence the ZIV's prognosis of only a slight positive trend for spring 2025.

About the ZIV

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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