

Spotlight on the cycling industry

From crisis to the start of a new era

Key points from the
sectoral study of the
cycling industry in
Germany, June 2025



More than
205,000 jobs
depend on the
cycling industry

Revenue of
€27 Billion

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T3 TRANSPORTATION
THINK TANK
Forschung zu nachhaltiger Mobilität

Motivated by headwinds – why optimism in the cycling industry is on the up

The T3 Transportation Think Tank has carried out a new study on Germany's cycling industry on behalf of the trade organisation Zukunft Fahrrad. The study shines a light on the number of jobs in the sector and the revenue generated in 2024 compared with previous years. It shows that while the past year was very challenging, the industry held relatively steady and looks set to pick up the pace again.

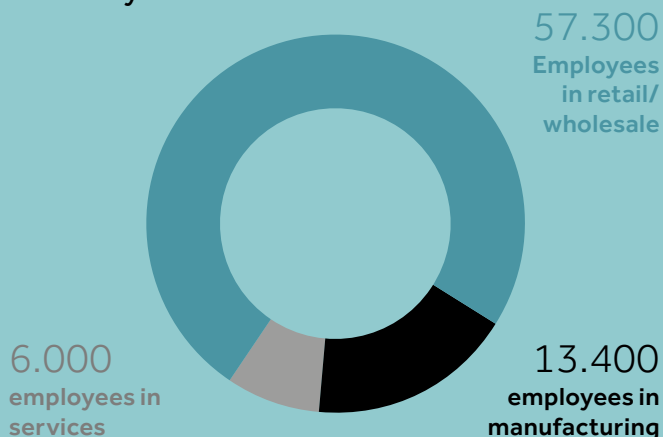
After the boom of previous years, 2024 marked a relative low point for the cycling industry. Companies were faced with declining demand, falling prices and the burden of excess stock. In contrast to the year before, 2024 saw the first decline in jobs and revenue, a sure sign that the upswing of recent times was losing momentum.

The number of jobs that depend on the cycling industry fell slightly. More than 205,000 jobs are linked directly, indirectly (through goods and services procured) or through induced effects (consumer spending by employees) to the core sectors of retail/wholesale, manufacturing and services. A slight fall in employment was recorded in manufacturing (down 4 per cent) and in retail/wholesale (down 1 per cent), while manufacturing revenue saw a significant drop of 10 per cent.

At the same time, other areas of the sector have proven remarkably resilient. Cycling-related services, particularly bike leasing, have remained more or less on course. Providers of company bike leasing have continued to hire (number of employees up 16 per cent) and almost matched the revenue levels of 2023 (down 3 per cent). Their ongoing contribution is essential to keeping the industry on an even keel. Overall, the areas of bike sharing, subscription services and used bicycle sales have also seen an increase in the number of employees and they have raised their revenue.

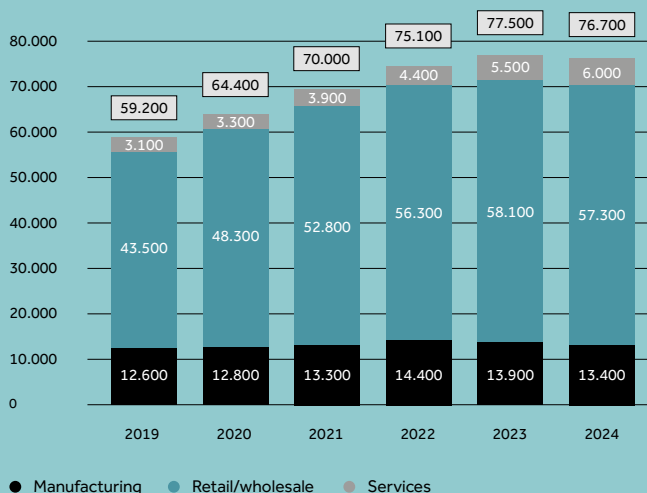
There are grounds for optimism despite this mixed picture, as the industry has established itself as a stable pillar of the German economy. And despite the hardships, the downturn in 2024 should be considered a market correction, with the promise of a new upswing. What is needed now is a strong tailwind, and if policymakers can set the right course, the market will be able to reach its full potential. The demand for active, sustainable transport, tourism and logistics is there. Cycling is just waiting to unleash its power as an economic force.

Direct employees in the cycling industry in Germany in 2024



In 2024, almost 76,700 people were employed in the areas of retail/wholesale, manufacturing and services.

Employment in the core areas of manufacturing, retail/wholesale and services since 2019



Revenue in core areas of the cycling industry since 2019

