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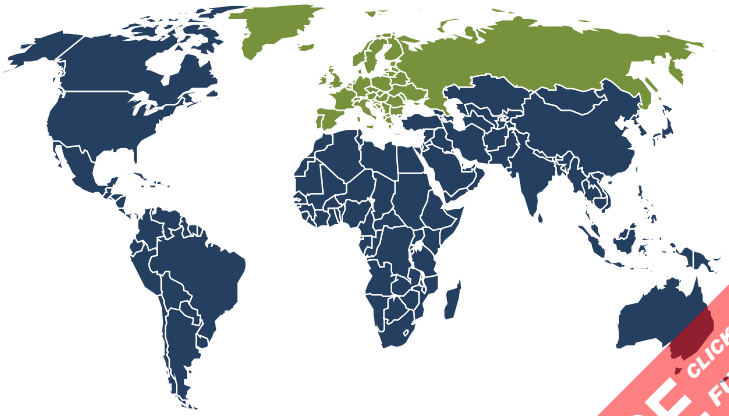
Global Collection

E-Bikes: Europe

September 2020



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About This Report

Scope

This report forecasts to 2020 and 2024 e-bike demand in units in Europe. Total demand is segmented by region in terms of:

- Western Europe
    - Germany
    - Netherlands
    - France
    - Belgium
    - Italy
    - other western Europe
- Eastern Europe

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

This report examines the European e-bike market. An e-bike – or electrical bike – is defined as a conventional bicycle featuring pedals and an integrated electric motor, both of which can be used to propel the rider. Typically, e-bikes are powered by rechargeable lithium ion batteries. While some e-bikes feature a small motor to assist the riders pedaling, others have much more powerful motors, allowing them to reach higher speeds, travel greater distances, and function more like mopeds and scooters than conventional bicycles. Commuter-type e-bikes are the most commonly used product type globally, although specialty models – such as e-mountain bikes and e-cargo bikes – have grown in popularity.

Although new regulations have been adopted for e-bikes all over the world in recent years, e-bikes typically do not require a license or insurance and do not need to be registered.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 4 | Countries in Western Europe

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium*	Greenland	Luxembourg	Spain
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom
France*	Isle of Man	Norway	Vatican City
Germany*	Italy*	Portugal	

*Major e-bike markets

Source: The Freedonia Group

Table 5 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

Source: The Freedonia Group

Sources

E-Bikes: Europe (FE85045) is based on *Global E-Bikes*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | NACE Codes Related to E-Bikes

NACE CODE	Definition
30.92	Manufacture of bicycles and invalid carriages

Source: European Commission

Table 7 | HS Codes Related to E-Bikes

HS Code	Definition
8711.10	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, with reciprocating internal combustion piston engine not exceeding 50-cc, with or without side-cars; side-cars
8711.20	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine, of cylinder capacity exceeding 50-cc but not exceeding 250-cc; with or without side-cars; side-cars
8711.30	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine, of cylinder capacity exceeding 250-cc but not exceeding 500-cc, with or without side-cars; side-cars
8711.40	Motorcycles (including mopeds) and cycles; fitted with an auxiliary motor, reciprocating internal combustion piston engine of cylinder capacity exceeding 500-cc but not exceeding 800-cc, with or without side-cars; side-cars
8711.50	Motorcycles (including mopeds) and cycles; fitted with auxiliary motor, with reciprocating internal combustion piston engine of a cylinder capacity exceeding 800-cc, with or without side-cars; side-cars
8711.60	Motorcycles (including mopeds) and cycles; fitted with auxiliary motor, with electric motor for propulsion, with or without side-cars; side-cars
8711.90	Motorcycles (including mopeds) and cycles; n.e.c. in heading no. 8711, fitted with auxiliary motor, with or without side-cars; side-cars

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published

data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2. The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Mobile World

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Organisation for Economic Co-operation and Development
UN Comtrade
World Customs Organization