

European Cargo Bike Industry Survey Results 2021

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About the survey

- An anonymous [survey](#) of cargo bike brands, taken between May 20 and June 11, 2021
- 38 cargo bike brands participated (DE 14, NL 6, FR 4, Other European 12, Asian 2)
- Covers models for both private and commercial use
- Is designed to indicate the market sentiment of respondents
- Originally presented at [EUROBIKE ACADEMY](#) on Sept 2, 2021

European Cargo Bike Industry Survey 2021



**Growing momentum.
Survey participants
expect their sales in
Europe to grow by a
record 66% in 2021.***

Market growth

- Total sales of the 38 European survey participants:
 - 2019: 33,235
 - 2020: 45,995
 - 2021: 75,843 (projected)
- Growth rate:
 - 2020: 38.4%
 - 2021: 65.9% (projected)

Comparison data*

- 103,000 cargo bikes were sold in Germany during 2020 (+40%)
- 2% of the total German bike market was cargo bikes

[*ZIV market data for Germany 2020](#)

Top national markets

- Countries with most mentions as European top market from the 38 survey participants:

Belgium	12
Germany	8
France	5

- No statement on total size of national markets but on their dynamism and relevance for survey participants.
- Belgium's top score is a result of effective political and financial incentives. (Only 11.4 million inhabitants, no Belgian brands among survey participants)

**Belgium leads.
Belgium and
Germany have
especially emerged
as key cargo bike
markets in Europe.**

Motorized vs Non-motorized

- Cargo bike sales of the 38 survey participants in 2020 included
 - 92% Motorized models
 - 8% Non-Motorised models
- Motorized models were predominantly Pedelec25, other forms of electric assist < 2%

Comparison data*

- 24.5% of cargo bikes sold in Germany during 2020 were non-motorized

Power matters.
Electrically assisted models made up 92% of all European cargo bike sales in 2020.

[*ZIV market data for Germany 2020](#)

Based on responses from 38 cargo bike brands to the European Cargo Bike Survey 2021

EN standard

- The developing EN standard will define security requirements and test methods for cargo bikes.
- 34 out of 38 survey respondents are aware of the standard. Of those;
 - 7 respondents are currently contributing to the European standardisation working group for cargo bikes
 - 22 respondents are interested in contributing
- Survey organizers ECLF and cargobike.jetzt support the European standardisation working group as liaison member ([see more](#))

**Safety matters.
European cargo bike
producers have a
high interest in
actively developing
European Standards.**

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Interpretation of survey results

- The survey looks at market growth dynamics but does not assess the total European market size
- The representativity of the 38 anonymous survey participants for all cargo bike brands is unclear. It is probably reduced e.g. by the low number of Danish compared to German survey participants (2 vs 14).
- While several brands at EUROBIKE 2021 confirmed the expectation of 66% more sales in Europe in 2021, others were more reluctant, pointing to supply chain problems and some struggling brands



European Cargo Bike Industry Survey

2021

Survey results online:

cyclelogistics.eu/market-size

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