Cycling as an economic factor in Germany

Prognos AG, Berlin

Dipl.-Geograph Stephan Kritzinger

International Cycling Conference 2017
Mannheim, 19 – 21 September
Cycling contributes to a small, but important extent to Germany's Economy

Annual turnover*

Automotive Industry: 405 €bn/a
Cycling Industry: 15 €bn/a
All other Industries: 2613 €bn/a

*No external benefits & costs, no turnovers generated when shopping by bike

Source: Own calculations; Statistisches Bundesamt, Destatis-WZ-Klasse WZ08-29 (Herstellung von Kraftwagen und Kraftwagenteilen)
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Employment (full time equivalents)

- **Automotive Industry:** 800,000
- **Cycling:** 150,000
- **All other Industries:** 42.1 millions

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It’s worth a closer look!
More bike than car sales in Germany!

Domestic sales per year (2016)

- Cars: 3.4 millions
- Bicycles: 4.3 millions

Domestic annual production (2016)

- Cars: 5.7 millions
- Bicycles: 2.2 millions

Source:
- Sales: KBA, ZIV;
- Production: VDA
Cycling is an economic factor in Germany

Annual Turnover €15bn

- 8,0
- 5,6
- 0,7
- 0,2

Indirect impacts
- Cycling Services
- Cycling Infrastructure
- Production & trade

Employments 150,000
(full time equivalents, FTE)

- 100
- 45
- 2
- 3

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Production and Trade of cycles

Annual Turnover €5,6m

- Production of bikes: 0.75
- Selling: 4.45
- Repair & maintenance: 0.40

45,000 FTE

- Production of bikes: 4
- Selling, repair & maintenance: 41
Cycling services

Annual Turnover €200m

- Bicycle Rental: €50m
- Transport services by bike: €65m
- Tourism, excursions, fairs: €60m
- Associations & lobbying: €25m

2,000 FTE
Cycling Infrastructure

Annual Turnover ca. €700m

- Repair & Maintenance: €100m
- Parking: €100m
- Investments: €500m

Type of service | Average costs
--- | ---
Construction of cycling lanes | 150 – 200 €/m
Cycling parking spaces | 50 – 4,500 €/bike
Repair & maintenance | 1.5 €/m/a

Annual Turnover ca. €700m
3,000 FTE

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Indirect impacts

Annual Turnover ca. €8bn

- Travel to and from cycling holiday
- Cyclists expenditures (tourism)

100,000 FTE

- Travel to and from cycling holiday
- Cyclists expenditures (tourism)

Annual Turnover ca. €8bn

- 4,0
- 4,0

- 63
- 37

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Conclusions

- Small share in economic terms but high presence on roads and in towns
- Many small entities all over the country
- High resilience against economic downs & ups
- Sustainable products & services
- Cycling is an enabler for tourism – and enhances significant expenditures
Source:

Raumkom / Prognos:

Grundlagenuntersuchung zur Situation des Radverkehrs in Deutschland

Im Auftrag des Bundesministeriums für Verkehr und digitale Infrastruktur, Referat G23;

Unveröffentlichter Schlussbericht vom 23. Februar 2017;
hier: Kapitel 3: Der Radverkehr als Zukunftsbranche (S. 368 – 399)
Wir geben Orientierung.
Prognos AG – Europäisches Zentrum für Wirtschaftsforschung und Strategieberatung.

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