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A NEW ERA FOR CYCLING IN THE POST COVID-19 OUTBREAK:

Booming sales between governmental initiatives and changes in consumer behavior

The outbreak of COVID-19 all over the world has undoubtedly represented the most unexpected disruption of the year. When taking into consideration the growing sentiment and perplexities related to the Urban Mobility ecosystem in Europe, it is not surprising to see that COVID-19 has given a boost to Cycling: what is astounding is the dimension of such a boost.

More than 2,300km of cycling infrastructures have been announced in Europe since the beginning of the pandemic and over 1 billion Euro has already been spent on Cycling by local authorities at national level. New cycling lanes, but also incentive schemes to purchase bicycles and e-bikes as well as lower speed limits in inner cities have proved to be a consistent mix of triggering factors that politics has used to provide city dwellers with an alternative feasible solution to public transport.

On the other side, policy makers have to deal with the worrisome rates of air pollution. At European level, Road Transport is responsible for 70% of all Transport emissions and the transition towards more sustainability means real support for affordable, accessible, healthier and cleaner alternatives to the current general mobility habits: that is why the European Commission has adopted a strategy for sustainable and smart mobility in its proposal for a EU Green Deal and the words of the European Commission's Vice President Frans Timmermans during his press conference in May 2020 about a 20 billion Euro fund for Urban Mobility in Europe mentioned Cycling as one of the mobility segments to be funded.

Alongside the increasing number of initiatives in Europe to support Cycling and the opportunities that will derive from the implementation of the EU Green Deal, Consumer behaviour seems to be part of the ongoing "revolution" too: the attention on health definitely means distancing to avoid crowded transportation but also a stronger focus on active mobility, with a higher convergence between physical activity and commuting in comparison with the past. Moreover, International travel restrictions – together with the

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economic impact of COVID-19 on jobs and growth - are making long-haul trips very difficult or less attractive, with positive repercussions for local Bike tourism: a Green industry that is valued 44 billion euros a year.

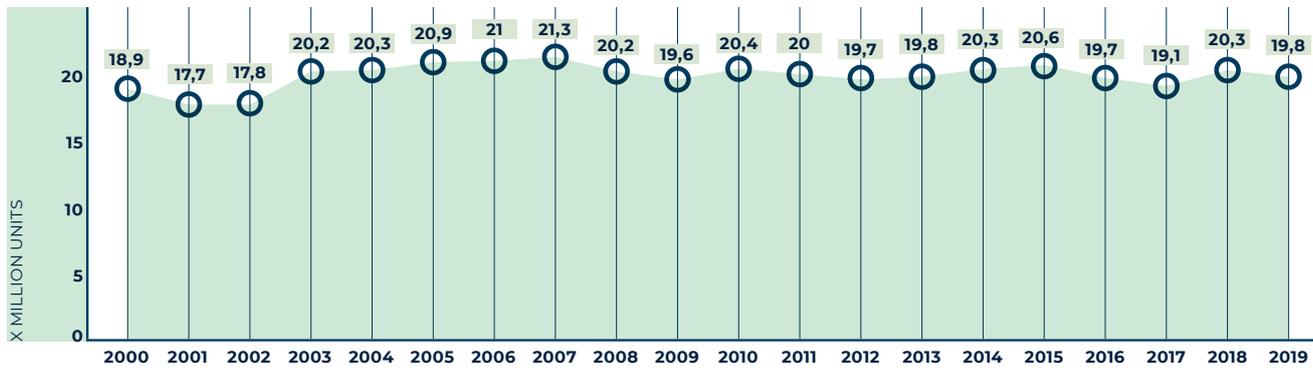
Sales are booming in Europe: bicycle sales, which were slightly decreasing before the COVID-19 outbreak, are now on the rise again and the e-bike phenomenon sees a double-digit growth on a yearly basis that is very likely to continue in the years to come.

In 2019, the total joint sales of bicycles and e-bikes remained similar to the previous year, amounting to around 20 million units sold, while the overall sales value continued to increase: that was due to the pedal assist

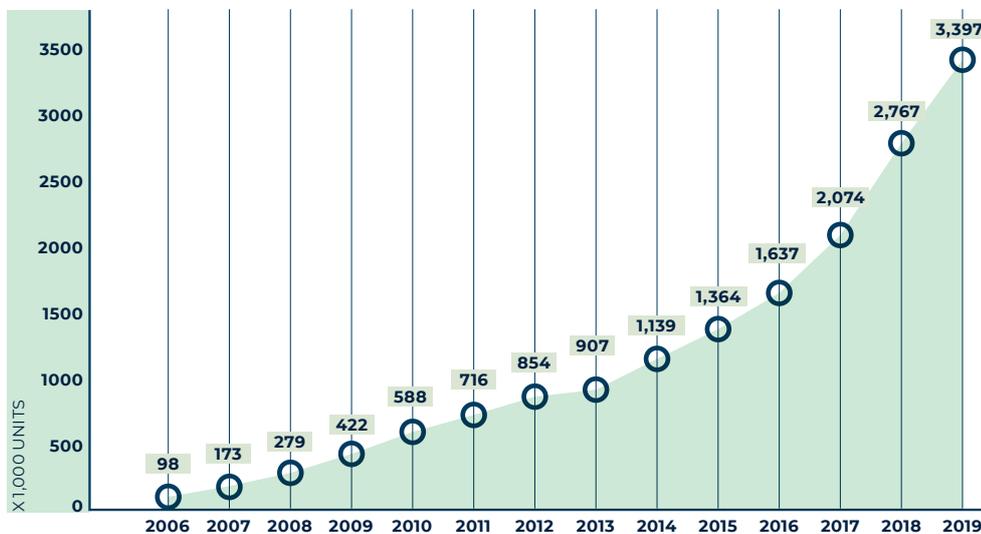
e-bikes sold, which grew by 23% from 2018 to 2019, surpassing the mark of 3 million units sold annually for the first time and representing 17% of the total bicycle sales. Estimates show that e-city and e-mountain bikes accounted for around 70% of the e-bike market, with a 30% share for the latter.

With regard to the first half of 2020, the demand in Europe has increased over 50% in comparison with the first half of 2019: from the Industry standpoint, EU factories are working hard to respond to the unprecedented increased demand. What has mitigated the disruptions caused by such a sudden and steep growth is the fact that the capillary distribution of the industry in Europe - composed

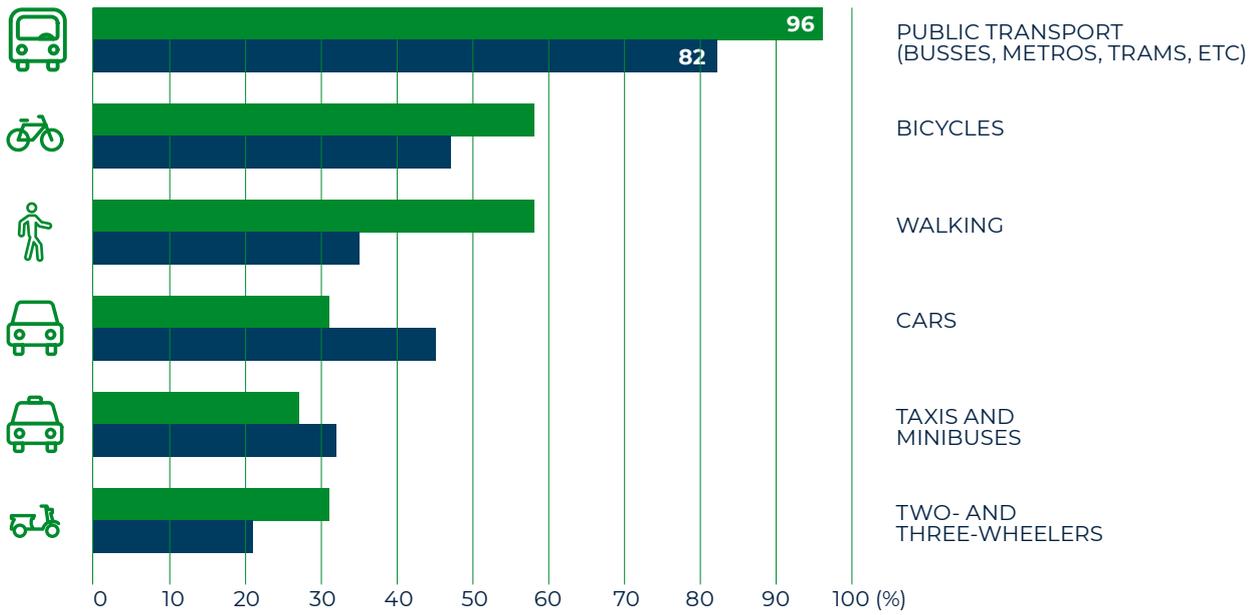
2020 EDITION (2019 STATISTICS) / SALES
EIROPEAN BICYCLE AND EPAC SALES (EU28)
(X MILLION UNITS) 2000 - 2019



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DAC/ODA-COUNTRIES VS. NON-DAC/ODA-COUNTRIES



of more than 900 manufacturing companies (most of them SMEs) in 24 out of 27 EU countries and 120,000 green jobs – allowed for a prompt and flexible reaction.



When thinking about the future of Urban Mobility, The International Energy Agency states that a key question is whether changes to transport behaviours during the crisis may result in a permanent change in behaviours or if transport patterns will revert to ‘business as usual’ when the crisis ends. Research has shown that disruptions can be a catalyst for shifts towards more sustainable transport and a recent study supported – among others - by the World Economic Forum, highlights a remarkable growing usage of bicycles and e-bikes by mid-century:

A 2019 analysis by Deloitte predicts that tens of billions of additional bicycle trips per year will take place in 2022 over 2019 levels: this increase in Cycling will double the number of bicycle users in many major cities around the world where cycling to work is still uncommon. In addition, Deloitte foresees as well a high increase in usage as a consequence of the prominent role that digitalisation will have in making Cycling Safer and Smarter.

With regard to the former, one of the main reasons why people do not ride bikes is because of road safety concerns related to the lack of appropriate cycling infrastructures and presence of motorized vehicles in mixed traffic. The ongoing developments of global regulations by the United Nations on Blind Spot Information Systems for trucks and buses, on avoidance of Car Dooring accidents with cyclists

and on Vulnerable Road User detection via vehicle communication (B2V) will save lives in the future and will bring a much wider spectrum of new potential users to embrace Cycling.

With regard to Smarter Mobility, the digital world is already bringing mobility to a new dimension also by providing simple and immediate information related to localization and routes. Solutions via Big Data analytics are enabling city mobility managers to improve the multimodal offer to the community and thus reinforcing the rationale behind digital platforms for multimodal transportation – called Mobility as a Service (MaaS): in other words, the combination of bicycles and e-bikes with other means of transportation is becoming a widely adopted practice around Europe, despite differences in the levels of MaaS adoption and implementation among EU countries.

In conclusion, COVID-19 undoubtedly marks a cleavage between “before” and “after”, but the trend in terms of Cycling rates and sales is the result of a complex change in political decisions, environmental challenges, consumer awareness and technological innovation that started far before the pandemic. The future is bright, but it is up to us to keep it that way.

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