

# **GLOBAL BICYCLE PURCHASING INDEX (GBPI)**

**WAVE 01/25 – KEY RESULTS**

June 25, 2025



# MANAGEMENT SUMMARY



## **Rather subdued mood in the industry**

The results of the first wave of the GBPI show a rather subdued industry sentiment (index value 101.6). Overall, the situation is rated as average at best but with a negative tendency.

All industry participants - assemblers, parts & components manufacturers and distributors - agree on this.



## **But a little bit of sun comes through**

The situation of their own company is rated as fair to partly good by the market participants.

An improvement is also expected for the second quarter of 2025 compared to the same quarter of the previous year.



## **Market indicators turn slightly positive**

The somewhat brighter outlook is supported by the assessment of specific market developments.

A slight increase in new incoming order levels can be seen on average across the market. Inventories are generally not being built up any further and are tending towards a reduction.



## **More sourcing and faster delivery**

As a result, the contracted companies themselves are also buying more, the assemblers are procuring more parts & components and the parts & components manufacturers are buying more raw and semi-finished materials.

The timeliness of supplier deliveries has increased, which can be cautiously interpreted as an indicator of a slight increase in market momentum.

# THE GBPI-PROJECT



The Trade Fair Partner



The Media Partner



The Research Partner



**Study Objective:** Establish a new sentiment and trend barometer for the global bicycle industry, as an early indicator and for informed decision-making



110 interviews

Field work in  
June 2025

**Methodology:** Invitation via the communication channels of EUROBIKE and Bike Europe, online survey (CAWI), LOI: 5 minutes

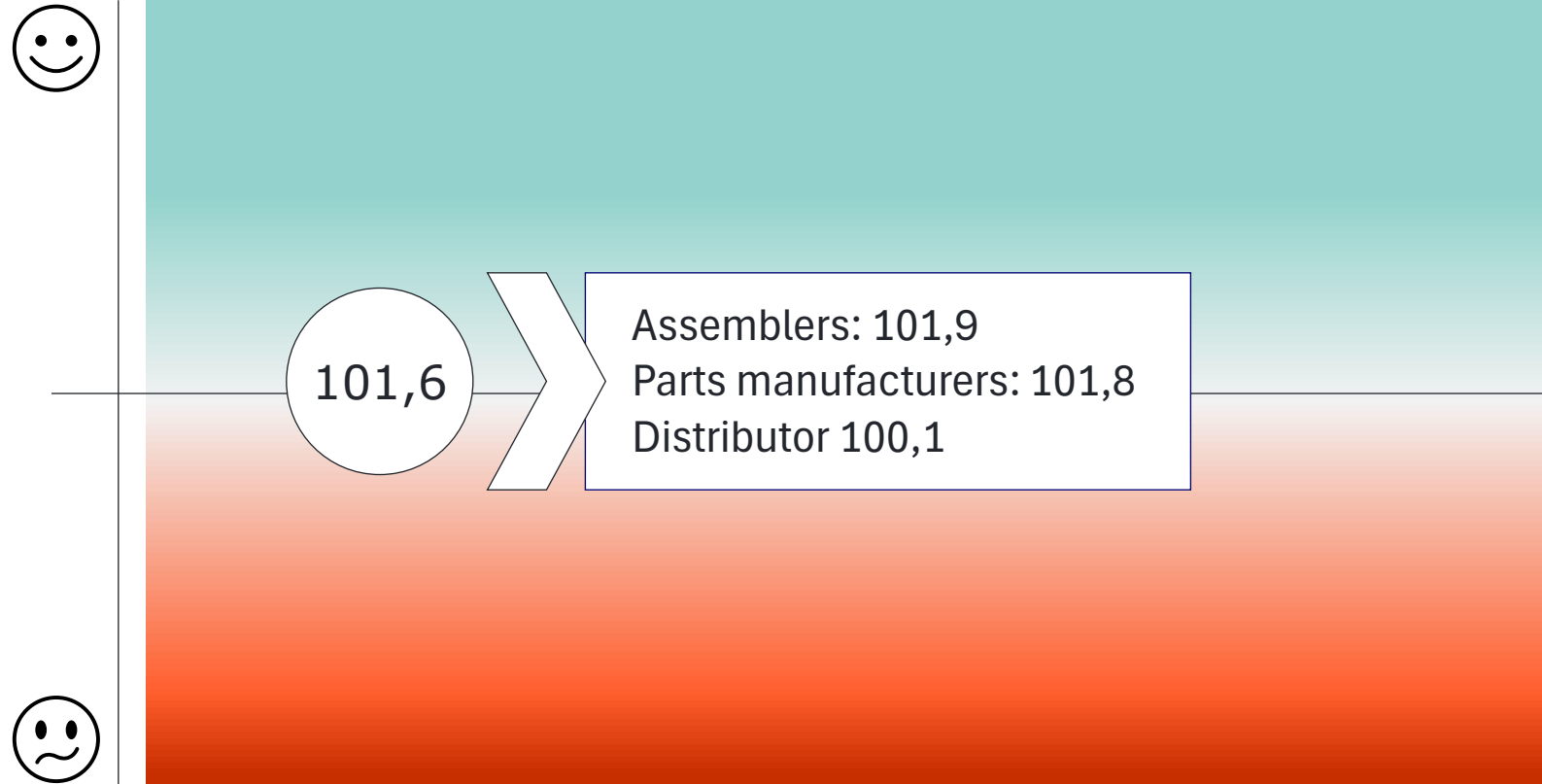


+ 19 further countries

## Target Groups

45% assemblers  
42% parts manufacturers  
13% distributors

# KEY RESULTS - GLOBAL BICYCLE PURCHASING INDEX (GBPI)



Wave 1  
June 2025

$f_x$

## Composition of the Index

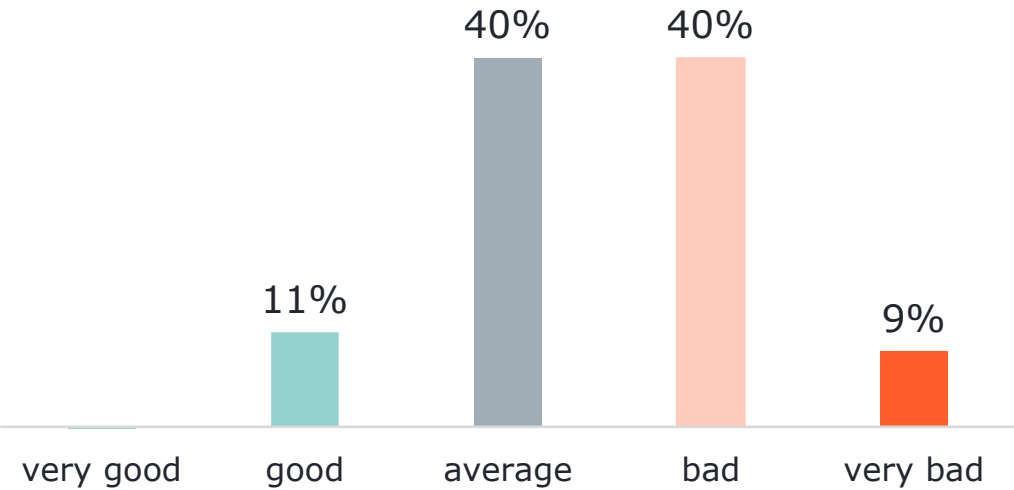
A total of 8 items on the (current/future) situation of the industry and your own company are included in the index

## Calculation of the Index

$100 + \text{sum}(\text{Q1.a mean index values} + \dots + \text{Q2.e/f/g mean index values})$

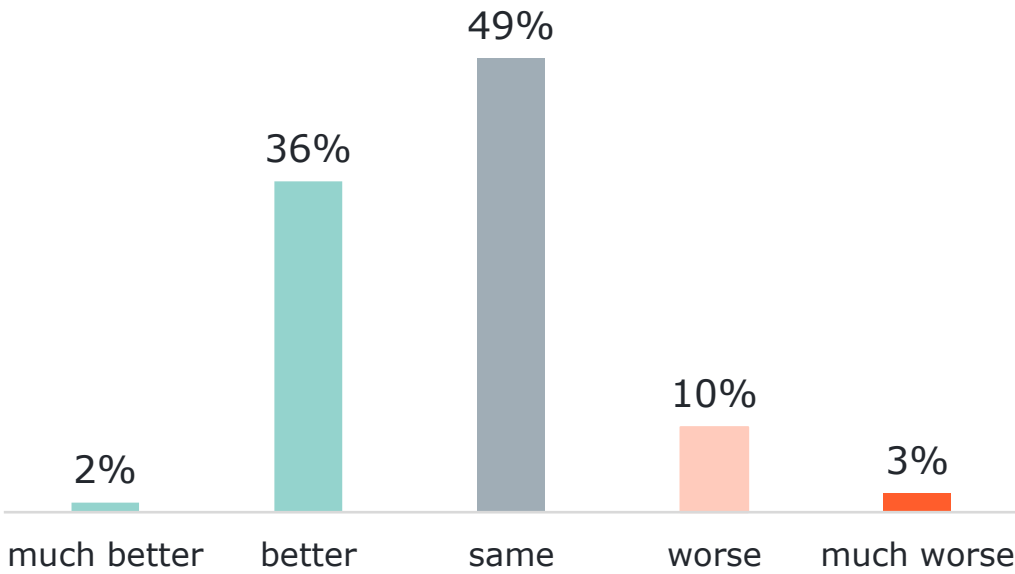
# ASSESSMENT OF THE INDUSTRY'S SITUATION

Current Situation of the **Industry**



**Q1.a:** In general, how do you rate the current situation in the bicycle industry?

Short-Term Expectations of the **Industry**

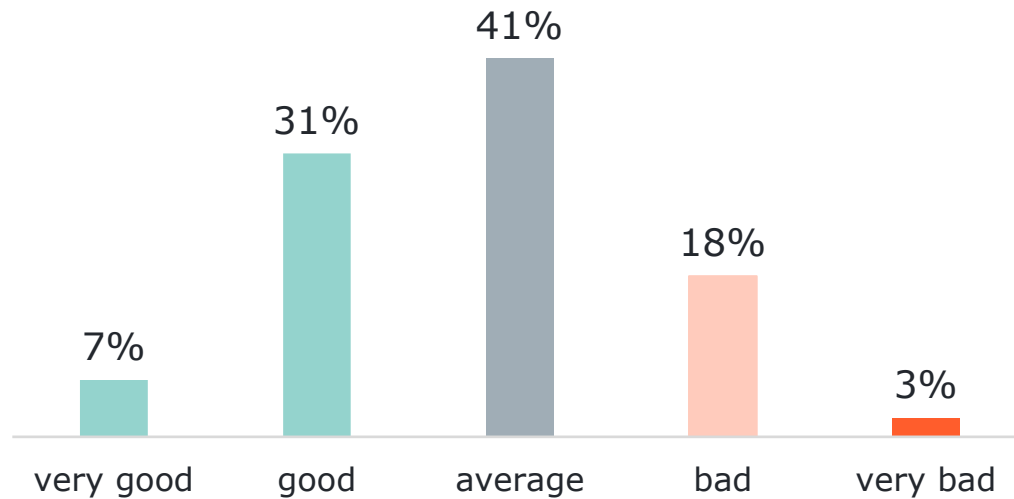


**Q1.b:** How do you think the situation in the bicycle industry will develop this quarter (Q2/25) compared to the same quarter last year?

# ASSESSMENT OF THE COMPANY'S SITUATION

## Current Situation of **Own Company**

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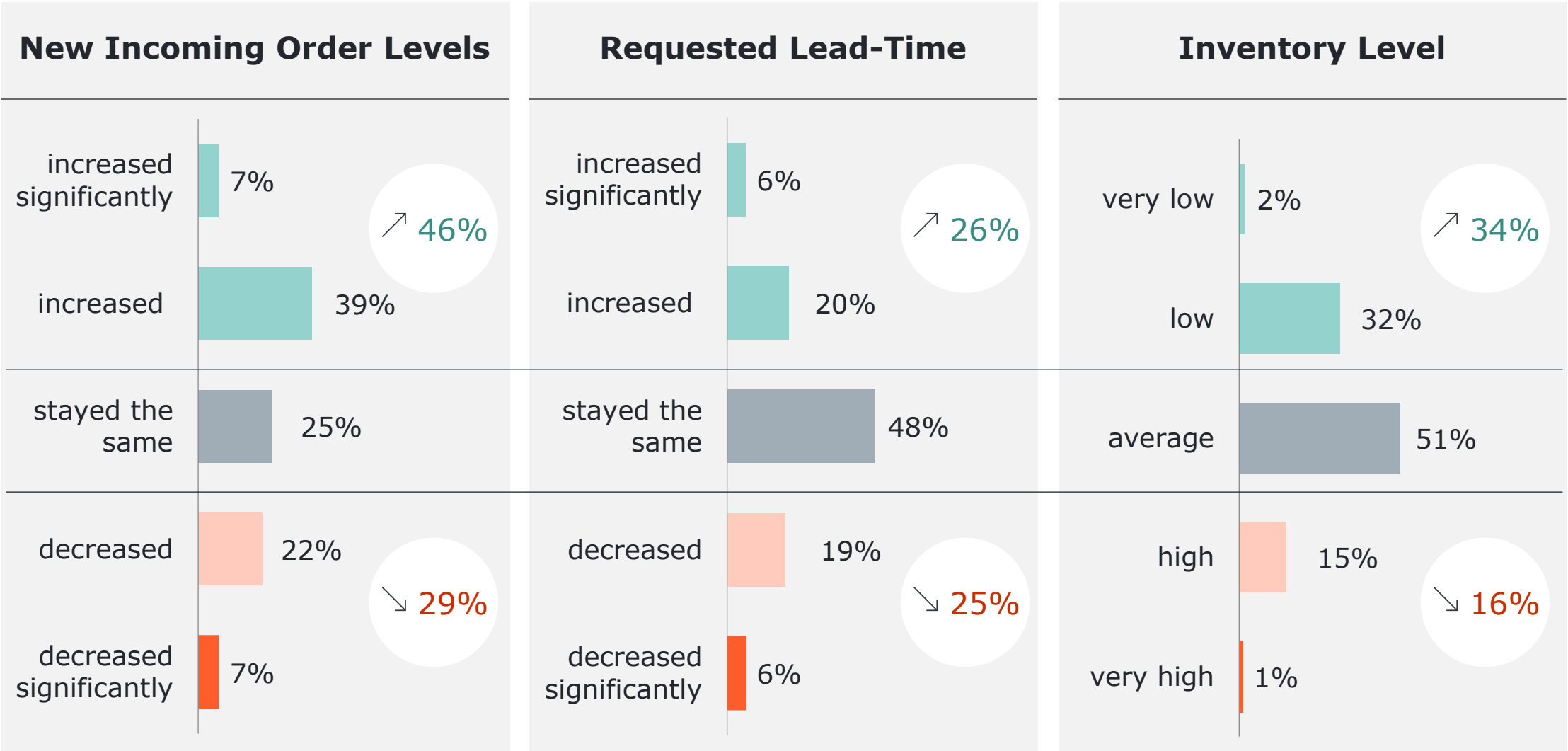
**Q1.c:** How do you assess the current situation specifically for your company?



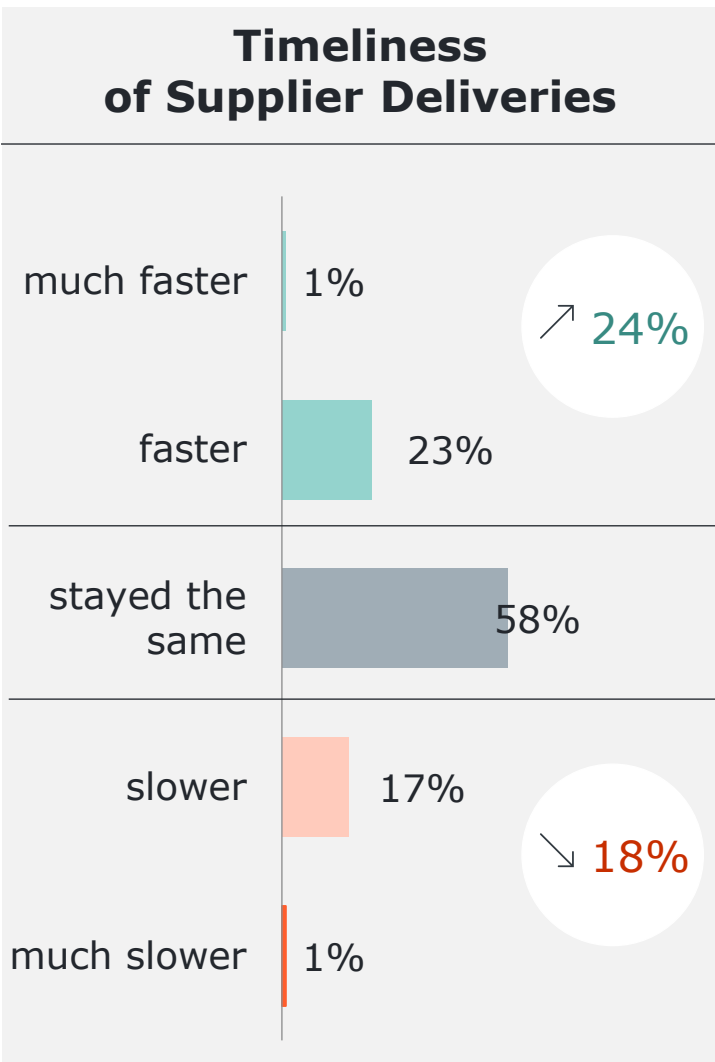
**Christian Pfeiffer**  
EUROBIKE  
Digital Brand Communication  
Manager

"Right now, optimism and skepticism seem to go hand in hand in the industry. The Global Bicycle Purchasing Index is set to become a key barometer for what's ahead."

# COMPARING Q2/25 TO THE SAME QUARTER LAST YEAR (1/3)



# COMPARING Q2/25 TO THE SAME QUARTER LAST YEAR (2/3)



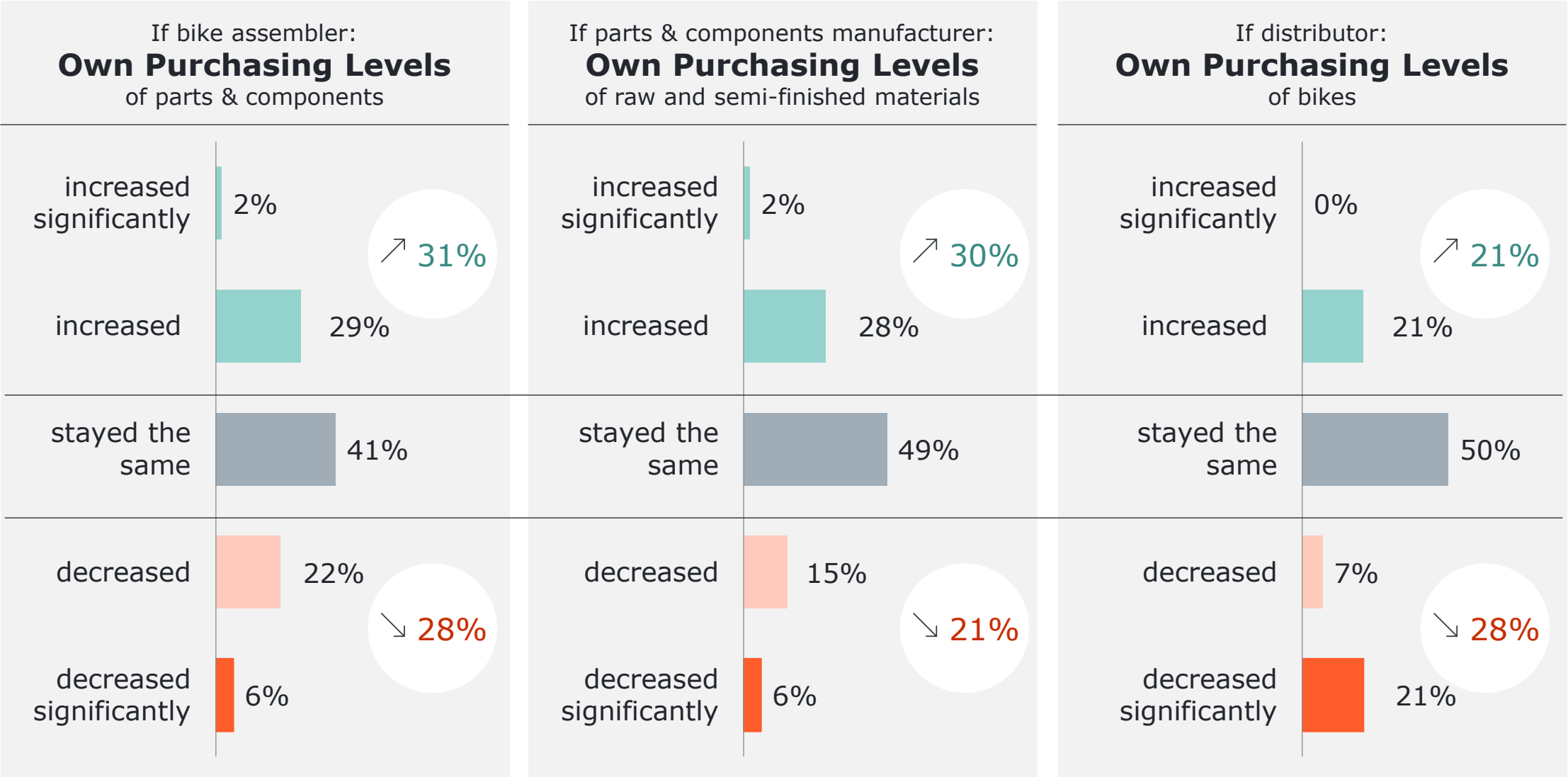
**Jan-Willem van Schaik**

Editor-in-Chief  
Bike Europe

"In the bicycle industry to date, procurement and product teams responsible for giving out order quantities in a company lack a lot of tools and indicators. The GBPI can fill this gap."



# COMPARING Q2/25 TO THE SAME QUARTER LAST YEAR (3/3)



**Q2.e:** (if bike assembler): How has your company’s purchasing levels for parts & components changed this quarter compared to the same quarter last year? **Q2.f:** (if parts & components manufacturer): How has your company’s purchasing levels for raw and semi-finished materials changed this quarter compared to the same quarter last year? **Q2.g:** (if distributor): How has your company’s purchasing levels for bikes changed this quarter compared to the same quarter last year?

## WHAT'S NEXT?



Curious to learn more about the **Global Bicycle Purchasing Index**? Scan the QR code to access insights, take part in future surveys, and stay informed!"



# CONTACT



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