SURVEY OF FRENCH CARGO BIKE MANUFACTURERS
BUILDING ON A PROMISING FOUNDATION

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In September 2021, the French union of professional cargo bike users, Les Boîtes à Vélo, published a first note on the French cargo bike industry with data provided by 26 manufacturers. In March 2023, with support from the Union Sport et Cycle (which represents cycle manufacturers) and the CARA, CYGO and Vélo-Vallée mobility clusters, the association was able to gather feedback from 37 manufacturers.

This note contains an economic overview as well as proposals to stimulate development of the French industry of cargo bikes and utility trailers. In the French version, a detailed presentation of the manufacturers is also available.

**Definition of a cargo bike**
A cycle designed to transport the rider as well as a load greater than 45kg. This also includes coupled cycles and trailers.
# The French Cargo Bike Industry in Figures

37 respondents out of 49 identified manufacturers

## Number of Direct Jobs Generated by the Industry

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Time Equivalent Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>162</td>
</tr>
<tr>
<td>2022</td>
<td>219 (+57)</td>
</tr>
<tr>
<td>2023</td>
<td>282 (+63)</td>
</tr>
</tbody>
</table>

## Gross Sales of the Sector

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (€)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>4,100,000</td>
<td>*</td>
</tr>
<tr>
<td>2019</td>
<td>7,300,000</td>
<td>*</td>
</tr>
<tr>
<td>2020</td>
<td>13,300,000</td>
<td>* (data from the previous survey)</td>
</tr>
<tr>
<td>2021</td>
<td>20,700,000</td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>30,400,000</td>
<td>of which 14% are exports</td>
</tr>
<tr>
<td>2023</td>
<td>47,300,000</td>
<td>* (forecast)</td>
</tr>
</tbody>
</table>

* data from the previous survey

* forecast
### Number of Cargo-Bikes or Trailers Produced in 2022

- **Cargo Triycles / Trikes:** 3108
- **Rear-loader Two-Wheeled (Longtails):** 2577
- **Triporteurs and Tricycles:** 3108
- **Biporteurs:** 1064
- **Vélos rallongés et petits porteurs:**
  - Professionals: 1591
  - Families: 255
  - Local Authorities: 1064
- **Remorques utilitaires:**
  - Professionals: 275
  - Families: 1030
  - Local Authorities: 2175

Total: 8339 cargo bikes made in France.

### Share of Components Produced in France

- **Wheels:** 73%
- **Frames:** 66%
- **Batteries:** 18%
- **Drive Units:** 12%

22% of the 33000 which have been sold in France (source: Observatoire du cycle 2022) are French cargo-bikes.
7 PROPOSALS TO DEVELOP THE INDUSTRY

1 SUPPORT DEMAND FOR CARGO BIKES
Strongly encourage professional and family use of cargo bikes (through infrastructure, regulations, purchase incentives, raising awareness, training).

2 CONSOLIDATE THE INDUSTRY
Provide human and financial resources to the sector to help it structure itself, promote interconnections, and defend its interests in discussions on normalization.

3 RELOCATE ADDED VALUE
Develop manufacturing in France of cargo bike-specific frames and high value-added components. Inventory all companies in the sector. Propose a 'made in France' rating system to show the role of these companies in the development of French industry.
4 SCALE UP INVESTMENTS
Facilitate access to land, real estate, equipment, stock and industrialization engineering for manufacturers.

5 PROMOTE INNOVATION
Encourage innovation around cycle components and technologies. Recognize opportunities in the second hand and re-use markets.

6 ASSIST COOPERATION EFFORTS
Support initiatives such as purchasing cooperatives, cargo bike bench tests, and multi-stakeholder assembly plants.

7 HIGHLIGHT THE PROFESSION
Implement and promote certifications of professional cargo bike technicians.
THE FRENCH ASSOCIATION LES BOITES À VÉLO
brings together the largest community of companies that use bicycles and cargo bikes to transport goods, people and services. It pursues a non-partisan objective of social utility and general interest, aimed at promoting the use of bicycles as the main mode of professional mobility in all branches and industries.

WITH THE SUPPORT OF

UNION SPORT ET CYCLE
is the leading professional organization of the Sport & Leisure sector in France. It represents among others the companies of the cycle industry and brings together, within a dedicated commission, distributors, retailers, service providers, manufacturers and brands.

CARA
European Cluster for mobility solutions, French cluster based in Auvergne-Rhône-Alpes in the centre east of France, comprises 430 members, including manufacturers, transport operators, universities, research and education centers. CARA also represents the PFA Automotive Industry and Mobilities.

CYGO
the union of cycle industry companies in the west of France, materializes the will of these companies to cooperate. CYGO’s objective is to highlight the excellence of companies in the Brittany, Centre-Val de Loire and Pays de la Loire Regions, to accelerate the reindustrialization of these Regions, to boost innovation and to develop training and employment.

VÉLO VALLÉE
founded in 2018 at the initiative of companies and the investment agency of the Occitanie Region in southern France, brings together 45 members who share the same «velosophy»: in order to bring forward the French bicycle, it is better to pedal in a tight pack! The Vélo Vallée’s vocation is to federate, represent and contribute to the development of all bicycle-related companies, by focusing on their economic and industrial development, quality of life, promotion of the territory and all cycling practices, sustainable development and innovation.
Survey of French Cargo Bike Manufacturers

Building on a promising foundation

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les boîtes à Vélo