

Bicycle Market Size, Share & Growth Report, H2-2026: Industry Outlook By Product Type, By Technology, By End User, By Distribution Channel, Companies and Countries to 2032

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Abstracts

The global Bicycle Market is estimated to generate \$92.2 Billion in 2026. Further, between 2026 and 2032, the market size is forecast to grow at a CAGR of 4.7% to reach \$121.5 Billion in 2032. This Bicycle report provides a comprehensive analysis across By Product Type (Road Bicycles, Mountain Bicycles, Hybrid, Cargo Bicycles, Others), By Technology (Electric Bicycles, Conventional Bicycles), By End User (Men, Women, Kids), By Distribution Channel (Specialty Bicycle Retailers, Online Retailers, Mass-Merchandise Stores, Others), across 5 geographic regions, and 22 countries.

Sustainable Urban Mobility and Performance Cycling Drive Bicycle Market Demand

The bicycle industry encompasses road, mountain, gravel, hybrid, electric, children's, cargo, and commuter bicycles serving recreational, competitive, urban mobility, fitness, and commercial transportation applications. Demand continues to expand as consumers increasingly adopt cycling for health, environmental sustainability, congestion reduction, and active lifestyles. Municipal cycling infrastructure, outdoor recreation, and premium sports participation continue to support demand across both conventional and electric bicycle categories. Purchasing decisions increasingly emphasize lightweight frame materials, drivetrain efficiency, rider ergonomics, connectivity features, durability, and aftermarket service support. Advances in carbon fiber engineering, electric-assist technologies, digital integration, and precision manufacturing continue to reinforce bicycles as strategically important products within personal mobility and sporting goods markets.

Smart Bicycle Technologies, Carbon Engineering, and Global Manufacturing Expansion

Manufacturers are strengthening bicycle portfolios through advanced engineering, digital technologies, and production investments. Giant Group continues expanding its RideControl smart e-bike ecosystem, integrating connected electronics, intelligent battery management, and enhanced rider interfaces across premium electric bicycle platforms. Shimano continues advancing electronic drivetrain technologies and connected component ecosystems that improve shifting precision, diagnostics, and riding performance across performance bicycles. Trek Bicycle continues expanding premium road, mountain, and electric bicycle offerings while investing in rider-focused innovation, lightweight frame development, and integrated accessory platforms. Manufacturers are also implementing robotic carbon-frame production, automated quality inspection, digital engineering simulations, and precision assembly technologies to improve manufacturing efficiency, product consistency, and performance.

Connected Cycling Platforms, Sustainable Manufacturing, and Premium Product Diversification Shape Industry Trends

Manufacturer activities demonstrate an accelerating transition toward intelligent bicycles supported by digital connectivity, lightweight engineering, and sustainable manufacturing. Companies are incorporating integrated sensors, wireless electronic shifting, predictive maintenance capabilities, GPS-enabled connectivity, and AI-assisted product development to enhance rider experience and optimize component performance. Product portfolios continue diversifying through performance gravel bikes, urban e-bikes, cargo bicycles, endurance road bikes, and customized mobility solutions tailored to varied consumer requirements. Recycled frame materials, renewable-energy-powered manufacturing, regional assembly expansion, and circular component recycling initiatives are becoming increasingly important competitive differentiators. These developments position the bicycle industry as an innovation-driven mobility sector where intelligent product integration, sustainable production, advanced materials engineering, and application-specific product diversification increasingly define long-term market competitiveness.

Shifting Consumer Expectations and Industry Transformation

Young and adult consumers across markets are increasingly scrutinizing products beyond price and brand, seeking greater visibility into ingredients or materials, their

origin, manufacturing location, quality, sourcing practices, and environmental attributes. This is increasing the importance of ingredient lists, nutrition labeling, allergen declarations, certifications, sourcing information and other product claims, while also raising the bar for transparency and substantiation.

In addition, the industry is being reshaped by advances in AI, ingredient and formulation technologies, automation, digital commerce, packaging technology and data analytics, creating new opportunities to accelerate product development, improve product quality and optimize operations. However, these capabilities require higher capital commitments, particularly as companies invest in store expansion and refurbishment, automation, AI-enabled systems, digital infrastructure and other productivity-enhancing technologies.

Competitive dynamics are also shifting as private-label and disruptor brands raise value expectations across selected price points, pushing established players to sharpen their entry, core and premium propositions. Private-label expansion, adjacent-category opportunities, M&A and AI are consequently creating new avenues for growth for manufacturers, suppliers and other industry participants across both developed and developing markets.

Impact of Tariffs and Inflation Rates on Bicycle Markets and Companies

Tariffs and elevated inflation are directly reshaping the cost structure and pricing strategies of Food & Beverages and Consumer Goods companies. The impact is particularly visible in imported ingredients and raw materials, packaging materials, energy, transportation, and other internationally sourced inputs, while higher consumer prices are increasing pressure on household purchasing decisions. The IMF WEO Data 2026 projects global headline inflation at 4.7% in 2026, while the continued use of tariffs and other trade measures is increasing uncertainty around sourcing and cross-border costs.

The report quantifies the impact of tariff changes and inflation on the market by analyzing country-level inflation trends, tariff exposure, import dependence, input-cost movements and pricing conditions, and assesses their implications for market volumes, revenues and margins.

Key Value-Creating Activities and Participants Across the Bicycle Industry Value Chain

Bicycle value chains are becoming more cost-sensitive and closely integrated, with changes in input prices, sourcing concentration, production efficiency, packaging costs, logistics and channel economics directly influencing margins and competitive positioning at each stage.

The report maps the value chain from upstream suppliers to end-use channels, identifies the principal participants and value-adding activities at each stage, and assesses the relative importance of procurement, manufacturing, packaging, logistics, distribution and retail in the forecast period.

Bicycle Pricing analysis- How Input Costs, Competition and Positioning Influence Bicycle Market Pricing

Pricing analysis in the report establishes how prices differ across products, segments, countries and channels and what is driving those differences. The report provides historical and current price benchmarks, country-level and regional comparisons, product-level pricing, and an assessment of the principal factors influencing price movements.

Five forces analysis- How Competitive Forces Are Shaping the Bicycle Industry

The chapter in the Bicycle report evaluates competitive rivalry, threat of new entrants, bargaining power of suppliers, bargaining power of buyers, and threat of substitutes, with each force assessed against the market's actual operating conditions. It analyzes market factors including fragmentation, product differentiation, manufacturing and distribution requirements, switching costs, supplier concentration, raw-material availability, retailer purchasing power, and the ability of consumers to substitute between brands. The report also examines how e-commerce and marketplaces are lowering certain barriers to market access while intensifying price transparency, and how established distribution networks, brand recognition, scale and customer relationships continue to protect incumbents across categories.

Critical Success Factors- Key Factors Determining Competitive Success in the Bicycle Industry

The report identifies the critical success factors that fuel growth in the Bicycle market, in addition to market trends and company capabilities. The Bicycle report evaluates critical success factors against the market's competitive environment and assesses how leading participants are strengthening them. Further, the chapter identifies the factors

with strongest influence on market-share retention, customer loyalty, pricing power, operating performance, and long-term competitive differentiation.

Segmentation analysis- How Demand Is Distributed Across Key Segments of the Bicycle Market

The report analyzes the global and regional markets across key types, applications, and other segments from 2021 to 2025. Further, forecasts are provided from 2026 to 2032. Key segments included in the study are By Product Type (Road Bicycles, Mountain Bicycles, Hybrid, Cargo Bicycles, Others), By Technology (Electric Bicycles, Conventional Bicycles), By End User (Men, Women, Kids), By Distribution Channel (Specialty Bicycle Retailers, Online Retailers, Mass-Merchandise Stores, Others).

US Bicycle Market - Strong Consumer Spending, Private-Label Expansion and Premium Product Demand

The US Bicycle companies are focusing on value positioning, distribution strength, product differentiation, and operating efficiency as private-label products gain ground against national brands. The US store-brand sales reached \$282.8 billion in 2025, growing 3.3% versus 1.2% for national brands, while store brands reached a record 21.3% dollar share and 23.5% unit share according to the Private Label Manufacturers Association. The report provides the US Bicycle market size outlook from 2021 to 2032 and the key factors shaping the market along with key strategies adopted by leading companies.

Canada Bicycle Market - Affordability, Retail Concentration and Supply-Chain Resilience Shape Market Growth

Over the past two years, Canadian companies have been focusing on value, supply-chain resilience and manufacturing efficiency to overcome trade and cost pressures. Retail demand also remained firm, with food and beverage retail sales increasing 4.4% year-on-year in December 2025, led by packaged dry foods, fresh meat and poultry, and snacks, according to Statistics Canada. The report identifies competitive pricing and product value, retailer access, diversified sourcing, productivity, brand positioning, and portfolio innovation as key success factors across the Canadian Bicycle value chain.

Mexico Bicycle Market- Rising Consumption, Manufacturing Expansion and Export Integration Drive Market Development

Mexico's Bicycle market is supported by a large domestic consumer base, established manufacturing capabilities, and strong export integration, while pricing remains an important consideration for consumers and manufacturers. The INEGI reported that the consumer prices for food, beverages and tobacco increased 5.13% year-on-year in May 2026, compared with 3.94% for overall consumer prices, keeping affordability and price management central to category performance. Leading companies are focusing on domestic manufacturing scale, ingredient availability, export competitiveness, product differentiation, efficient sourcing and supply-chain execution to gain profit margins.

Germany Bicycle Market- Private-Label Strength, Price Sensitivity and Manufacturing Efficiency Shape Competition

Value-for-money, private-label competitiveness, efficient sourcing, and cost control are central to market performance and continue to shape the market outlook. German food prices remained structurally above their pre-inflation baseline: the food and non-alcoholic beverages CPI reached 136.2 in 2025 (2020=100), compared with 121.9 for the overall CPI, although annual food inflation moderated to 2.0% in 2025. The market is also being influenced by Germany's policy push toward healthier eating and greater development of alternative protein products, creating additional opportunities for reformulation and product innovation.

France Bicycle Market- Premium Food Culture, Retail Transformation and Selective Consumer Spending Drive Demand

France's Bicycle market is being shaped by moderating food inflation, cautious household consumption and a shift in retail demand toward value and specialized formats. Household final consumption expenditure increased only 0.4% in volume in 2025, while household purchasing power declined 0.4%, keeping affordability and price-value positioning important despite the easing of inflation. Bicycle companies operating in France are balancing value-oriented pricing with quality and differentiation, strengthening supermarket and alternative-format distribution, managing procurement and supply-chain costs, and responding to increasingly selective household spending.

UK Bicycle Market- Import Dependence, Retail Concentration and Product Portfolio Expansion Influence Market Growth

The UK Bicycle market is strongly influenced by import dependence, household affordability, and retail concentration. Consumer expenditure on food and alcoholic

drinks reached ?303.3 billion in real terms in 2025, up 1.1%, with spending on food and drink eaten outside the home increasing 2.3% to ?137.7 billion, while household food expenditure was broadly flat. The structure of the industry also favors companies able to operate efficiently at scale: approximately 98.8% of UK food and drink manufacturing businesses are SMEs, creating a large and fragmented supplier base alongside major manufacturers and retailers. Over the forecast period, competitive pricing, procurement efficiency, product differentiation, retailer and foodservice relationships, import management and the ability to respond remain key success factors.

Spain Bicycle Market- Household Consumption, Tourism and Export-Oriented Manufacturing Support Demand

Spain's Bicycle market is supported by strong household food expenditure, a large tourism-driven consumption base and a highly export-oriented food industry, although consumers remain sensitive to price increases. Tourism provides an additional demand channel: international tourists spent €11.7 billion in Spain in April 2026 alone, up 7.4% year-on-year, including €1.99 billion on food and drinks, up 6.8%. Spain's food industry also reached a record level of exports in 2025, reinforcing its importance as an export manufacturing base and exposing producers to international trade conditions and supply-chain developments.

Italy Bicycle Market- Product Quality, Heritage and Export Competitiveness Remain Key Market Drivers

Italy's consumption structure favors companies capable of maintaining value across differentiated price points: household consumption expenditure averaged €2,738 per month in 2023, up 4.3% from 2022, although the increase reflected both higher spending and price effects. Italy's large manufacturing and export base supports demand for products with strong quality, provenance, and differentiation, particularly where Italian origin provides a competitive advantage. Companies that can combine Italy's established food-manufacturing capabilities with tighter cost control and differentiated products are better positioned to navigate slower domestic consumption and renewed price pressure.

China Bicycle Market- Digital Commerce, Brand Trust and Selective Consumer Spending Reshape Demand

China's Bicycle markets are being shaped by large-scale domestic consumption, rapid online retail expansion, increasingly selective spending and a widening performance

gap between categories. Total retail sales of consumer goods reached RMB 50.1 trillion in 2025, up 3.7%, significantly outperforming beverages at 1.0%. Online retail is particularly important: physical-goods online sales reached RMB 13.1 trillion, representing 26.1% of total consumer-goods retail sales, while online sales of food increased 14.5% according to the National Bureau of Statistics of China. Established brands retain an advantage where consumers prioritize familiarity and brand authority, while the rapid expansion of online food sales creates opportunities for digitally native brands and manufacturers capable of using data, AI, and platform ecosystems.

India Bicycle Market- Rising Consumption, Increasing Investment and Expanding Distribution Create Growth Opportunities

India's Bicycle market is being supported by rising household consumption, a large and increasingly diversified consumer base, expansion of food processing and continued investment in formal food manufacturing. India's rural monthly per-capita consumption expenditure reached ₹4,122 in 2023–24, up from ₹3,773 in 2022–23, while urban MPCE increased to ₹6,996, highlighting the continued expansion of household purchasing capacity across both rural and urban markets. The supply side is also becoming more organized and processing-intensive. Digital commerce and AI-enabled consumer engagement are also becoming increasingly relevant, particularly as Indian consumers adopt digital tools across product discovery and purchasing.

Japan Bicycle Market- Aging Consumers, Household Price Sensitivity and Digital Purchasing Reshape the Market

Japan's Bicycle markets are being shaped by high food expenditure, renewed price pressure and increasingly cautious real household consumption, alongside a structurally mature consumer base. Price pressure has also remained visible in 2026, with Japan's headline CPI increasing 1.5% year-on-year in May 2026, while core inflation excluding fresh food increased 1.4%. Meanwhile, online purchasing remains an important route to consumers: 55.3% of two-or-more-person households used online shopping in May 2026, with food contributing materially to the increase in online-shopping expenditure. Companies also need to manage smaller household sizes and differing consumption patterns by age, while maintaining strong product differentiation in a mature market where incremental volume growth is more difficult to achieve.

Brazil Bicycle Market- Strong Domestic Consumption and Export-Oriented Manufacturing Drive Growth

Brazil's Bicycle market is supported by a large domestic consumption base, a highly integrated agricultural and food-processing sector, and exceptional export competitiveness, while renewed food-price pressure is keeping affordability important. The country's food and beverage industry generated R\$1.388 trillion in revenue in 2025, equivalent to 10.9% of national GDP, with domestic sales reaching R\$1.02 trillion; retail accounted for R\$732 billion and foodservice R\$287.9 billion. Real industry sales increased 2.2%, while companies invested R\$41.3 billion, up 6.8%, including R\$26.7 billion in innovation, plant modernization and new technologies.

Middle East Africa Bicycle Market- Import Dependence and Value-Added Products Gaining Steady Demand Growth

The Middle East Bicycle markets are being shaped by high dependence on food imports, food-security investment, urbanization, tourism, premium retail and increasingly selective consumer spending, with conditions differing substantially between Gulf markets and the wider region. The GCC recorded overall inflation of only 1.8% in 2025, while food and beverage prices increased 1.2%, indicating relatively contained consumer-price pressure compared with many global markets. Across the region, this combination of import exposure and localization is increasing the importance of supplier diversification, local production, inventory management, and efficient logistics, while strong tourism, hospitality, and modern retail ecosystems are supporting demand for differentiated, convenience-oriented, and premium products.

Bicycle Competitive Landscape

The Bicycle competitive landscape is becoming more fragmented as established multinational brands compete simultaneously with private-label products, regional manufacturers, digitally native brands and category-focused disruptors. Competitive advantage is increasingly determined by the ability to balance price, product quality, innovation, distribution reach and speed of response rather than by brand scale alone. The report provides detailed analysis of leading companies including business profile, SWOT analysis, products and services, and financial profiles of Giant Manufacturing Co., Ltd., Trek Bicycle Corporation, Specialized Bicycle Components, Inc., Accell Group N.V., Pon Holdings B.V., Merida Industry Co., Ltd., Dorel Industries Inc., Shimano Inc., Hero Cycles Ltd., Brompton Bicycle Ltd..

Bicycle Market Segmentation

By Product Type

Road Bicycles

Mountain Bicycles

Hybrid

Cargo Bicycles

Others

By Technology

Electric Bicycles

Conventional Bicycles

By End User

Men

Women

Kids

By Distribution Channel

Specialty Bicycle Retailers

Online Retailers

Mass-Merchandise Stores

Others

Geographical Coverage

North America (US, Canada, Mexico)

Europe (Germany, UK, Spain, France, Italy, Russia, Rest of Europe)

Asia Pacific (China, India, Japan, South Korea, Southeast Asia, Rest of APAC)

Latin America (Brazil, Argentina, Rest of South and Central America)

Middle East and Africa (Saudi Arabia, UAE, MENA, South Africa, Sub-Saharan Africa)

Leading Companies in Bicycle Industry

Giant Manufacturing Co., Ltd.

Trek Bicycle Corporation

Specialized Bicycle Components, Inc.

Accell Group N.V.

Pon Holdings B.V.

Merida Industry Co., Ltd.

Dorel Industries Inc.

Shimano Inc.

Hero Cycles Ltd.

Brompton Bicycle Ltd.

Frequently Asked Questions

1. What is the current size of the Bicycle market?

The Bicycle market is estimated at US\$92.2 Billion in 2026, based on the report's

Bicycle Market Size, Share & Growth Report, H2-2026: Industry Outlook By Product Type, By Technology, By End U...

market sizing methodology. Demand is supported by new product launches, while competition from local labels is influencing near-term market performance. The market is expected to reach US\$121.5 Billion by 2032, reflecting the investment expansion of leading companies.

2. How fast is the Bicycle market expected to grow through the forecast period?

The Bicycle market is projected to expand at a 4.7% CAGR between 2026 and 2032, with growth concentrated in Asia Pacific.

3. Which segment currently accounts for the largest share of the Bicycle market?

The report analyzes the report across By Product Type (Road Bicycles, Mountain Bicycles, Hybrid, Cargo Bicycles, Others), By Technology (Electric Bicycles, Conventional Bicycles), By End User (Men, Women, Kids), By Distribution Channel (Specialty Bicycle Retailers, Online Retailers, Mass-Merchandise Stores, Others).

4. Which regions are generating the largest demand for Bicycle products?

Differences in consumer preferences, pricing, regulation and distribution infrastructure continue to create significant variations in market performance across regions. Asia Pacific is the fastest growing market driven by China, India, Southeast Asia, and other emerging markets.

5. Which companies are leading the Bicycle market?

The Bicycle market includes major participants such as Giant Manufacturing Co., Ltd., Trek Bicycle Corporation, Specialized Bicycle Components, Inc., Accell Group N.V., Pon Holdings B.V., Merida Industry Co., Ltd., Dorel Industries Inc., Shimano Inc., Hero Cycles Ltd., Brompton Bicycle Ltd.. Leading companies compete through product portfolio, distribution, technology, while recent competitive activity includes M&A, product launches, capacity expansion, and geographic expansion. Market leadership varies significantly by product category and geography.

Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2032
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Bicycle Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Bicycle Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010-2030
 - 1.5.2. Population Forecast by Country, 2010-2030
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL BICYCLE MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2032

- 3.1. An Introduction to Global Bicycle Markets in 2026
- 3.2. Global Historic and Forecast Bicycle Market Size Outlook, USD Million, 2021-2032
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2032
- 3.4. Market Dynamics
 - 3.4.1. Key Bicycle Market Driving Forces and Their Impact on Market Outlook
 - 3.4.2. Short and Long-Term Trends and Insights Shaping the Future

3.4.3. Potential Bicycle Market Opportunities for Industry Stakeholders

3.4.4. Potential Challenges across Bicycle Value Chain

CHAPTER 4- BICYCLE MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

4.1. Porter's Five Forces Analysis

4.1.1. Bargaining Power of Buyers

4.1.2. Bargaining Power of Suppliers

4.1.3. Threat of Substitutes

4.1.4. Threat of New Entrants

4.1.5. Intensity of Competitive Rivalry

4.1.6. Market Attractiveness Analysis by Segment

4.1.7. Market Attractiveness Analysis by Country

4.2. Competitive Landscape

4.2.1 Product Analysis of Leading Bicycle Companies

4.2.2 Recent Strategic Developments

4.2.3 Mergers, Acquisitions, and Partnerships

4.2.4 Key Success Factors

4.3. Value Chain Analysis

4.3.1. Key Value Chain Segments

4.3.2. Dominant players by value-chain stage

4.4. SWOT Analysis

4.4.1. Key Strengths and Opportunities

4.4.2. Major Weaknesses and Threats

4.5 Technology Roadmap

CHAPTER 5- BICYCLE MARKET OUTLOOK BY SEGMENTS

5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2032

5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2032

5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2032

By Product Type

Road Bicycles

Mountain Bicycles

Hybrid

Cargo Bicycles

Others

By Technology

Electric Bicycles
Conventional Bicycles
By End User
Men
Women
Kids
By Distribution Channel
Specialty Bicycle Retailers
Online Retailers
Mass-Merchandise Stores
Others

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

6.1. Base Case Scenario
 6.1.1. Definitions and Insights
 6.1.2. Market Size Outlook to 2032
6.2. Low Growth Case Scenario
 6.2.1. Definitions and Insights
 6.2.2. Market Size Outlook to 2032
6.3. High Growth Case Scenario
 6.3.1. Definitions and Insights
 6.3.2. Market Size Outlook to 2032

CHAPTER 7- NORTH AMERICA BICYCLE MARKET SIZE ANALYSIS AND OUTLOOK

7.1. North America Bicycle Market Overview
7.2. Leading Companies Operating in North America
7.3. Key Industry Statistics, 2026
7.4. North America Bicycle Market Trends and Growth Opportunities to 2032
7.5. North America Bicycle Market Size Outlook by Type
7.6. North America Bicycle Market Size Outlook by Application
7.7. North America Bicycle Market Size Outlook by Country
7.8. United States
 7.8.1. Key Statistics
 7.8.2. The US Bicycle Market Size Outlook, 2021- 2032
 7.8.3. Key Market Drivers and Industry Developments in the US Bicycle Companies
7.9. Canada

- 7.9.1. Key Statistics
- 7.9.2. Canada Bicycle Market Size Outlook, 2021- 2032
- 7.9.3. Key Market Drivers and Industry Developments in Canada Bicycle Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Bicycle Market Size Outlook, 2021- 2032
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Bicycle Companies

CHAPTER 8- EUROPE BICYCLE MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Bicycle Market Overview
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Bicycle Market Trends and Growth Opportunities to
- 8.5. Europe Bicycle Market Size Outlook by Type
- 8.6. Europe Bicycle Market Size Outlook by Application
- 8.7. Europe Bicycle Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics
 - 8.8.2. Germany Bicycle Market Size Outlook, 2021- 2032
 - 8.8.3. Key Market Drivers and Industry Developments in Germany Bicycle Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Bicycle Market Size Outlook, 2021- 2032
 - 8.9.3. Key Market Drivers and Industry Developments in France Bicycle Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Bicycle Market Size Outlook, 2021- 2032
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Bicycle Companies
- 8.11. Spain
 - 8.11.1. Key Statistics
 - 8.11.2. Spain Bicycle Market Size Outlook, 2021- 2032
 - 8.11.3. Key Market Drivers and Industry Developments in Spain Bicycle Companies
- 8.12. Italy
 - 8.12.1. Key Statistics
 - 8.12.2. Italy Bicycle Market Size Outlook, 2021- 2032
 - 8.12.3. Key Market Drivers and Industry Developments in Italy Bicycle Companies
- 8.13. Rest of Europe
 - 8.13.1. Key Statistics

- 8.13.2. Rest of Europe Bicycle Market Size Outlook, 2021- 2032
- 8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Bicycle Companies

CHAPTER 9- ASIA PACIFIC BICYCLE MARKET SIZE ANALYSIS AND OUTLOOK

- 9.1. Asia Pacific Bicycle Market Overview
- 9.2. Leading Companies Operating in Asia Pacific
- 9.3. Key Industry Statistics, 2026
- 9.4. Asia Pacific Bicycle Market Trends and Growth Opportunities to
- 9.5. Asia Pacific Bicycle Market Size Outlook by Type
- 9.6. Asia Pacific Bicycle Market Size Outlook by Application
- 9.7. Asia Pacific Bicycle Market Size Outlook by Country
- 9.8. China
 - 9.8.1. Key Statistics
 - 9.8.2. China Bicycle Market Size Outlook, 2021- 2032
 - 9.8.3. Key Market Drivers and Industry Developments in China Bicycle Companies
- 9.9. Japan
 - 9.9.1. Key Statistics
 - 9.9.2. Japan Bicycle Market Size Outlook, 2021- 2032
 - 9.9.3. Key Market Drivers and Industry Developments in Japan Bicycle Companies
- 9.10. India
 - 9.10.1. Key Statistics
 - 9.10.2. India Bicycle Market Size Outlook, 2021- 2032
 - 9.10.3. Key Market Drivers and Industry Developments in India Bicycle Companies
- 9.11. South Korea
 - 9.11.1. Key Statistics
 - 9.11.2. South Korea Bicycle Market Size Outlook, 2021- 2032
 - 9.11.3. Key Market Drivers and Industry Developments in South Korea Bicycle Companies
- 9.12. Australia
 - 9.12.1. Key Statistics
 - 9.12.2. Australia Bicycle Market Size Outlook, 2021- 2032
 - 9.12.3. Key Market Drivers and Industry Developments in Australia Bicycle Companies
- 9.13. Southeast Asia
 - 9.13.1. Key Statistics
 - 9.13.2. Southeast Asia Bicycle Market Size Outlook, 2021- 2032
 - 9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Bicycle Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA BICYCLE MARKET SIZE ANALYSIS AND OUTLOOK

- 10.1. South and Central America Bicycle Market Overview
- 10.2. Leading Companies Operating in South and Central America
- 10.3. Key Industry Statistics, 2026
- 10.4. South and Central America Bicycle Market Trends and Growth Opportunities to
- 10.5. South and Central America Bicycle Market Size Outlook by Type
- 10.6. South and Central America Bicycle Market Size Outlook by Application
- 10.7. South and Central America Bicycle Market Size Outlook by Country
- 10.8. Brazil
 - 10.8.1. Key Statistics
 - 10.8.2. Brazil Bicycle Market Size Outlook, 2021- 2032
 - 10.8.3. Key Market Drivers and Industry Developments in Brazil Bicycle Companies
- 10.9. Argentina
 - 10.9.1. Key Statistics
 - 10.9.2. Argentina Bicycle Market Size Outlook, 2021- 2032
 - 10.9.3. Key Market Drivers and Industry Developments in Argentina Bicycle Companies
- 10.10. Rest of Latin America
 - 10.10.1. Key Statistics
 - 10.10.2. Rest of Latin America Bicycle Market Size Outlook, 2021- 2032
 - 10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Bicycle Companies

CHAPTER 11- MIDDLE EAST AND AFRICA BICYCLE MARKET SIZE ANALYSIS AND OUTLOOK

- 11.1. Middle East and Africa Bicycle Market Overview
- 11.2. Leading Companies Operating in Middle East and Africa
- 11.3. Key Industry Statistics, 2026
- 11.4. Middle East and Africa Bicycle Market Trends and Growth Opportunities to
- 11.5. Middle East and Africa Bicycle Market Size Outlook by Type
- 11.6. Middle East and Africa Bicycle Market Size Outlook by Application
- 11.7. Middle East and Africa Bicycle Market Size Outlook by Country
- 11.8. Saudi Arabia
 - 11.8.1. Key Statistics
 - 11.8.2. Saudi Arabia Bicycle Market Size Outlook, 2021- 2032

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Bicycle Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Bicycle Market Size Outlook, 2021- 2032

11.9.3. Key Market Drivers and Industry Developments in the UAE Bicycle Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Bicycle Market Size Outlook, 2021- 2032

11.10.3. Key Market Drivers and Industry Developments in Africa Bicycle Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Bicycle Industry

Giant Manufacturing Co., Ltd.

Trek Bicycle Corporation

Specialized Bicycle Components, Inc.

Accell Group N.V.

Pon Holdings B.V.

Merida Industry Co., Ltd.

Dorel Industries Inc.

Shimano Inc.

Hero Cycles Ltd.

Brompton Bicycle Ltd.

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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