THE YEARLY CYCLE LOGISTICS BAROMETER

Belgian Cycle Logistics Federation

2025 (Third edition)

BELGIAN CYCLE LOGISTICS FEDERATION

Acknowledgment

This report has been produced by the Belgian Cycle Logistics Federation (BCLF).

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We are equally grateful to everyone who contributed to the writing and development of this report. Your dedication has been essential in shaping its content and impact.

Our sincere appreciation goes to our members, whose continued engagement drives the mission of the BCLF, and to our Board and Advisory Board for their invaluable guidance and support.

We extend special thanks to the Belgian Federal Public Service for Mobility and Transport whose financial support has made this work possible and enabled further progress in advancing the Cycle Logistics sector.

Foreword

The Belgian Cycle Logistics Federation (BCLF) brings together businesses, operators, and stakeholders around a common goal: unlocking the full potential of cycle logistics.

Our mission is to maximize the use of bike deliveries as a means to combat climate change, create fair and high-quality jobs in the transport sector, contribute to more livable and sustainable cities, and develop a sustainable economic sector.

This report marks the **third edition of the Yearly Cycle Logistics Barometer**. Building on insights gathered from previous studies, it provides an updated and comprehensive analysis of the sector's growth and evolution in Belgium. As urban logistics face increasing pressure, gaining a clear understanding of the challenges and opportunities of last-mile delivery is more important than ever.

The final stage of delivering goods to customers remains one of the most complex and resource-intensive components of the supply chain, accounting for up to half of total logistics costs. Current trends, including rising energy prices, increasing logistics costs, geopolitical uncertainty, and ambitious climate objectives are placing increasing pressure on cities and on urban transport systems. Progress in the electrification of commercial fleets in Belgium has been limited: in the first quarter of 2025[1], only 6.6% of newly registered vans were electric. This slow uptake underscores the need for complementary solutions that can deliver immediate impact. Against this backdrop, cycle logistics is emerging as a practical, cost-effective, and sustainable alternative. By enabling efficient navigation of dense urban environments whilst reducing emissions and congestion, cycle logistics contributes directly to the achievement of European climate and mobility targets and strengthens the resilience of city logistics systems.
The study documents the progress achieved in cycle logistics, highlights emerging trends and persistent challenges, and sets out recommendations to support the sector's continued development. Through ongoing analysis, it seeks to provide robust evidence and actionable insights for stakeholders, policymakers, industry leaders, and all actors engaged, directly or indirectly, in shaping the future of sustainable urban delivery systems.

[1] The European Automobile Manufacturers' Association

Executive summary

Urban logistics is a cornerstone of Belgium's economy, sustaining more than 100,000 jobs in transport and processing over 408 million parcels in 2024. However, the sector is under mounting pressure: congestion costs continue to escalate, profitability remains fragile, and the environmental footprint of motorised logistics is increasingly untenable. Transport accounts for one quarter of Belgium's greenhouse gas emissions with road traffic responsible for the overwhelming majority. This trajectory underscores the urgent need for cleaner, more efficient delivery models that can alleviate pressure on cities, strengthen economic resilience and accelerate progress towards national and European climate objectives.

Against this backdrop, cycle logistics has emerged as one of the most dynamic and resilient solutions within Belgium's urban delivery landscape. In 2024, the sector recorded a substantial growth, delivering 5.25 million parcel equivalents, representing **a 70% increase compared to the previous year**. Cycle logistics operators collectively covered more than 10.7 million kilometres avoiding over 4,000 tonnes of CO_2e emissions and generating measurable savings in congestion, air pollution, and noise costs. These outcomes demonstrate the sector's capacity to deliver tangible environmental and economic benefits while strengthening the resilience of urban transport systems. Brussels, Ghent, and Antwerp remain the strongest hubs, yet signs of growth are visible in other Belgian cities, signaling the sector's potential for broader national expansion while strengthening the resilience of urban transport systems.

The economic and social benefits of Cycle Logistics are becoming increasingly evident. Deliveries by cargo bikes reduce emissions at a fraction of the cost of motorised vehicles, ease congestion, and contribute to more liveable cities . At the same time, the sector is undergoing professionalisation. Operators are improving fleet management and seeking equipment designed for intensive, daily use. Insights from a project realised by the BCLF and Rayon9 on material-and-equipment workshop reveal that current cargo bike components remain too close to consumer-grade standards. To meet the requirements of professional high frequency use, and to lower total cost of ownership, equipment must be more robust, durable and specially engineered for heavy-duty logistics operations.

Employment trends confirm that cycle logistics remains an emerging sector. Following several years of rapid expansion, total employment declined by approximately 7% in 2024 reflecting market consolidation and strategic restructuring. Despite this adjustment, the sector's growth continues to be constrained by unfavorable structural challenges : high labor costs, persistently low delivery prices, thin margins resulting from an uneven competitive landscape, and general resistance to change.

Diversity also remains a concern, with many operators yet to achieve a gender-balanced workforce. Nevertheless cycle logistics jobs are overwhelmingly local, stable, and rooted within the communities they serve. Importantly, safety performance remains exceptionally strong: for the second consecutive year, operators reported with zero fatal incidents despite covering millions of kilometres .

Looking ahead, operators remain cautiously optimistic. Revenue expectations for 2025 indicate confidence in steady growth, even as predictions for rapid expansion moderate. Workforce forecasts point to a stabilisation, as companies balance growth ambitions with operational realities, evolving regulations and the need to safeguard profit margins . Across the sector, there is broad recognition that 2025 will be a year of consolidation, professionalisation, and preparation for scaling up.

At the regulatory level, the sector stands at a pivotal moment. Cargo bike definitions, equipment standards, and trailer regulations are being refined both nationally and at the EU level. With major European discussions underway, particularly around EPAC classifications, the coming years will be decisive in determining how quickly cycle logistics can expand and how effectively it can contribute to zero-emission urban mobility.

The Cycle Logistics Barometer 2025 offers a detailed snapshot of a sector in transition: expanding its footprint, refining operational practices, and navigating a rapidly evolving regulatory and market landscape. The evidence demonstrates how cycle logistics is becoming an integral component of urban transport systems, reshaping both economic models and mobility patterns while advancing European climate and mobility objectives.

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Terminology

Carrier Cycles

A cycle can be referred to as a bi-, tri- or quadricycle. To include the widest range of cycles on the market, this paper uses the word 'cycle'. Moreover, the word "**cargo bike**" is also widely used and known. Nevertheless, European standards (CEN/TC 333/WG 9) consider "carrier cycles" as a generic term. Therefore, the paper uses without distinction the terms "carrier cycles" and "cargo bikes".

EPAC (Electrically Power Assisted Cycle)

An EPAC, is a type of electric bicycle that only provides motor assistance when the rider pedals. The motor has a maximum continuous rated power of 250 W, and the assistance gradually decreases and cuts off once the speed approaches 25 km/h or when the rider stops pedaling[2]. If cycles comply with the requirements defined in EU Standard EN 15194, they are treated like regular bicycles in the traffic laws, they are permitted to use cycle paths, they don't need vehicle registration or a driver's license.

Parcel Equivalent

There are different valid definitions of a parcel. According to the Belgian Postal Law, a parcel is a 0 to 31,5 kg logistics unit. For logistics carriers, the definition of parcels varies from logistics units of 0 to 10 kg, to logistics units of 0 to 150 kg. For clarity, this paper considers a parcel equivalent as one logistics unit, independently from its content or its weight, size or height. This definition encompasses the wide variety of goods transported and delivered through carrier networks, extending beyond the usual legal definition of a parcel.

Third Party Logistics (3PL)

In logistics, a 3PL provider is a company that offers outsourced logistics services to other businesses. These services can encompass a wide range of supply chain activities, including transportation, warehousing, inventory management, order processing, freight forwarding, customs brokerage.

CO2 equivalent (CO2 eq.)

CO2 equivalent is a metric used to standardise the impact of various greenhouse gases (GHGs) by expressing their effects in terms of the global warming potential (GWP) of carbon dioxide (CO_2) over a specific time frame. It is typically used in corporate sustainability and reporting to evaluate the impact of an activity.

[2] Position Paper - Conebi - February 2025 EPACs that do not comply with the spirit of the EU standards and regulations

List of acronyms

BCLF: Belgian Cycle Logistics Federation

CIE : Cycling Industries Europe

GHG: Green House Gaz

GVW: Gross Vehicle Weight

ECF : European Cyclists' Federation

EPAC : Electrically Power Assisted Cycle.

FEBETRA : The Belgian Federation of Transporters and Logistics Service Providers

FTE : Full Time Equivalent

FUB : Fédération des Usagers de la Bicyclette

LCV: Light Commercial Vehicle

LEV: Light Electric Vehicle

LEZ : Low Emission Zone

NPO : Non Profit Organisation

SUMP : Sustainable Urban Mobility Plan

SULP : Sustainable Urban Logistics Plan

TCO :Total Cost of Ownership

VIL : Vlaams Instituut voor de Logistiek : Flanders Institute for Logistics

3PL : Third Party Logistics

Introduction

Belgium's logistics sector plays a vital role in the national economy, employing more than 100,000 people in road transport and functioning as a strategic gateway to Europe through the Port of Antwerpone of the continent's largest and most active logistics hubs[3]. Yet this essential system also generates significant externalities. . Urban congestion, air and noise pollution, and demanding working conditions place growing social, economic, and environmental pressures on cities and workers alike. In this context, improving efficiency, resilience, and sustainability is no longer optional; it is fundamental to ensuring the long-term viability and competitiveness of the sector .

The sector is large, mature, and continuing to grow, with particularly acute pressure on last-mile deliveries. This final stage of the supply chain, moving goods from distribution centres to customers, is dense, fragmented, and increasingly complex. The growth of E-commerce is driving demand: in 2024, 77% of EU internet users made online purchases, pushing parcel volumes to record levels and placing significant strain on delivery networks[4]. Road transport remains a major source of greenhouse gas emissions, responsible for 96% of transport emissions in Belgium[5], with the vast majority of fuel still derived from fossil sources[6]. At the same time, urban congestion is worsening. Motorists in Brussels lose nearly 118 hours per year in rush-hour traffic[7], placing the city among the three most congested in Europe during peak hours. Nationwide, traffic costs Belgium's economy €5.3 billion annually due to lost time, fuel consumption, and emissions[8].

Transforming logistics has become imperative, and new solutions are emerging to address the sector's growing challenges. Cycle logistics is one of the most promising approaches for last-mile deliveries: cargo bikes provide fast, flexible, and low-emission alternatives to traditional delivery vehicles. Cargo bikes can navigate congested streets with ease, shorten delivery times for short distance trips, and lower operating costs. Across Belgium, both specialised operators and mixed fleets are increasingly integrating cargo bikes alongside vans and electric vehicles. This evolution is part of a broader transition toward a diversified ecosystem of smarter, more sustainable urban logistics solutions that seek to balance efficiency, environmental impact, and social well-being.

This edition of the Cycle Logistics Barometer provides a comprehensive snapshot of the sector's transition. It maps the key actors in Belgium, provides an overview of market dynamics, analyses trends in equipment and technology and reviews relevant legal frameworks at national and EU levels. The report also distils key insights and sets out recommendations to guide future action. By capturing the sector's current momentum, the Barometer contributes to the development of a logistics system that is efficient,

[3] ITLB, Chiffres clés du secteur du transport routier de marchandises (2025).
[4] Eurostat, E-commerce statistics for individuals (2025)
[5] Baromètre de la transition (2025) où en est la Belgique dans sa transition vers la neutralité climatique en 2050 ? (p35 - numbers from 2023)
[6] European Council, Greener transport (2025)
[7] https://www.tomtom.com/traffic-index/
[8] Press Release from the Belgian Mobility Dashboard (2024) – The calculation includes motorists' lost time, additional fuel consumption due to the engine running, and the cost of extra vehicle emissions.

environmentally responsible, and resilient, one that can meet the demands of modern cities while minimising its social and environmental impacts.

Cycle Logistics

Definition of Cycle Logistics

In the first edition of the Cycle Logistics Barometer (2023), we proposed a holistic definition of the cycle logistics sector: **Cycle logistics refers to the professional transportation of goods or services by (carrier) cycles, including associated logistics activities such as handling, storage, and management of flows**.

Market Segments

In 2023, we detailed the different market segments. There are two main categories:

- **Professional carriers**: transporters providing services for third parties
- **Professionals with carrier cycles**: businesses delivering their own products or services

For more details, we would like to refer the reader to the 2023 edition of the Barometer.

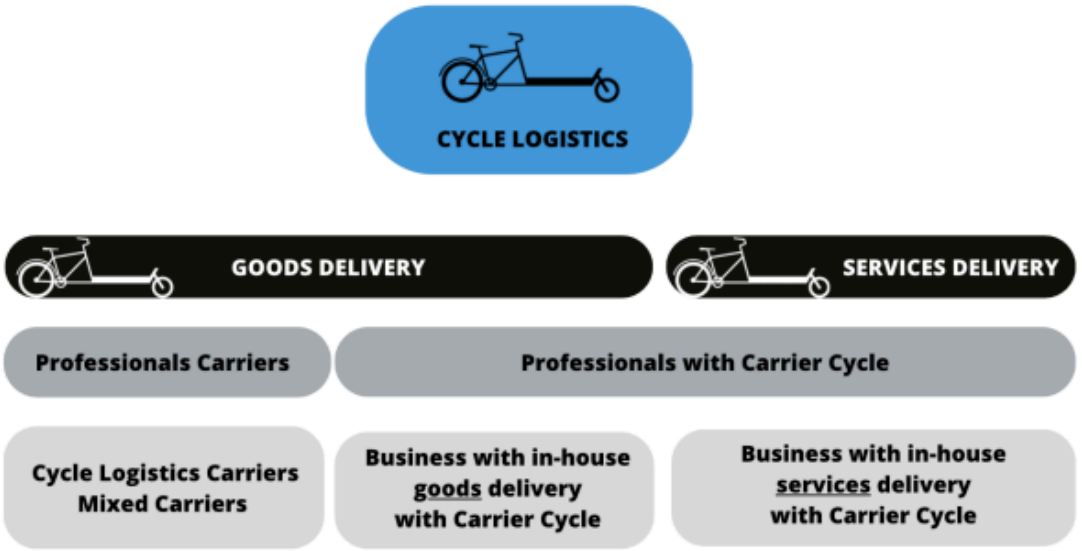


Figure 1 : The two main categories of Cyclo Logistics

The BCLF continues to focus on the **market segment of Professional Carriers**. The segment of Professionals with Carrier Cycles remains highly fragmented and will be addressed by the BCLF in the future.

Types of Urban delivery carrier types

In the Professional Carriers market segment, we distinguish between the Cycle Logistics Carriers, Mixed Carriers and Transport organizers.

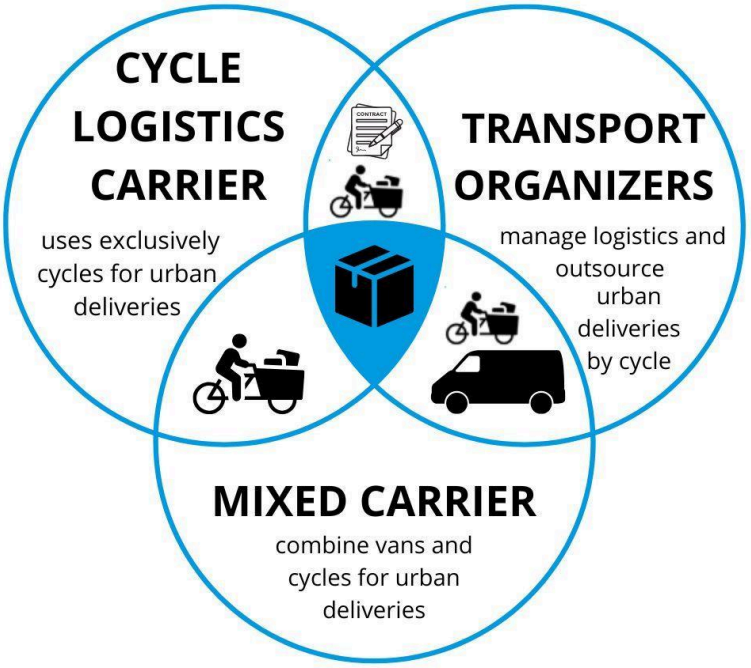


Figure 2 : Urban delivery carrier types

Cycle Logistics Carriers

The **Cycle Logistics Carriers** are organisations specialised in transporting goods for third parties **using almost exclusively (carrier) cycles** in urban areas. These organisations have the (carrier) cycles embedded in their core mission and typically share strong environmental and social values, offering fair and high-quality jobs. Most have deep roots in the circular and the local economy. Operating in one or several cities, they focus exclusively on last-mile delivery services. We shall consider these organisations as the pioneers of the sector.

Mixed Carriers

The **Mixed Carriers** are organisations specialised in the transport of goods for third parties using a diversified fleet that includes trucks, vans and (carrier) cycles. They typically operate at national and international level and manage very high deliveries volumes. Increasingly, these carriers recognize the potential for integrating cycles into their urban delivery fleet to enhance efficiency and sustainability. Owing to their substantial scale and resources, Mixed Carriers are well positioned to drive significant shifts toward cycle logistics and accelerate its adoption across the wider logistics ecosystem.

Transport Organizers (3PL)

Transport Organizers constitute the third key actor in the emerging sector of the cycle logistics ecosystem. These are typically large organisations which manage the logistics process on behalf of their clients. While these organisations do not operate their own delivery fleets, they hold decision-making authority over the choice of transport modes, including the use of cargo and carrier cycles through subcontractors. As such, transport organizers play a strategic role in shaping demand for cycle logistics.

The Cycle Logistics Sector in Belgium

In this section, we are depicting organisations belonging to the **market segment of Professional Carriers**. The landscape of Professional Carriers, presented on this map, is further detailed per category.

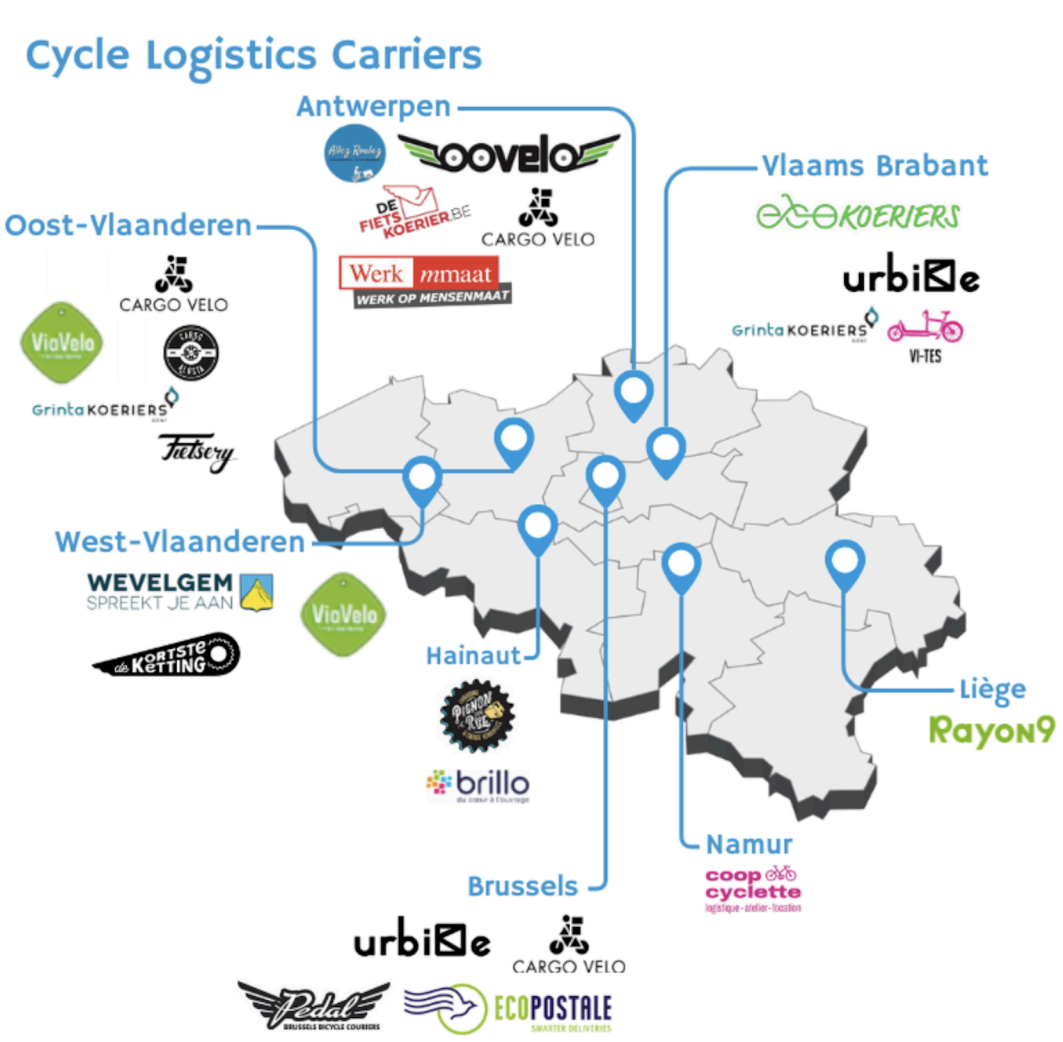


Figure 3 : Cycle Logistics Landscape in Belgium

Cycle Logistics Carriers in Belgium

The table below highlights the important Cycle Logistics Carriers operating in Belgium in 2024, to the best of our knowledge.

Organisation	Region	Detail
Allez rouler	Klein Brabant	Part of an NPO (Nektari), they offer bike rentals, repairs, lessons, rickshaw and cargo bike services, plus local delivery and waste collection initiatives.
Brillo	Charleroi	Brillo SC is a cooperative founded in 2008 to support employment initiatives in local services. They have been active in cycle logistics in the Charleroi area since 2023.
Cargo Alosta	Aalst	Small freelancer side activity.
Cargo Velo*	Antwerp, Brussels, Ghent	SME started in 2012. Strong development with its activities in numerous cities
Coopcyclette	Namur	SME started in 2022, part of the social economy (cooperative).
De Fietserij	Aalst	De Fietserij is a bike courier service, operating since 2018. It is part of the non-profit Stroom vzw, which uses social economy initiatives to create job opportunities for the long-term unemployed.
De fietskoerier	Antwerp	Oldest bike messenger company in Belgium, started 22 years ago (SME).
De kortse ketting	Kortrijk	Started in 2020 as a small side activity with the intention to develop further, focusing on bicycle transportation in and around Kortrijk.
Ecokoeriers	Mechelen	Part of an NPO (ConnAct) - social economy whose goal is to put workers far from the job market back on it.

Organisation	Region	Detail
Ecopostale	International (Brussels)	SME started in 2010. Focuses on express deliveries. Sends worldwide via subcontracting. Urban logistics by (carrier) cycle.
Fietskoerier	Lier	Part of a NPO (Werkmmaat) - social economy aiming at offering opportunities to (long term) unemployed.
Grintakoeriers	Asse, Ghent Halle & Vilvoorde	Part of an NPO (IntroGroep) - social economy aiming at offering opportunities to (long term) unemployed.
Oovélo	Antwerp	SME started in 2015 and is active in high end customers activities.
PedalBXL	Brussels	SME that focuses on express services.
Pignon sur rue	Mouscron	Small side activity.
Rayon9	Liège	SME, part of the social economy (cooperative). Started in 2015 and pursues an organic development.
Recyclo	Brussels	Cooperative active in circular economy
Snel & Wel	Aalst, Ninove & Oudenaarde	Since 2024, the former bike courier service Snel & Wel has been part of De Fietserij.
Urbike	Brussels, Ghent & Leuven	SME, part of the social economy (cooperative). Started in 2018 and offering other services, related to cycle logistics activities (consulting, training, etc).
ViaVelo	Deinze, Waregem, Kortrijk	SME started in 2015 with a strong development process and social anchoring.

Organisation	Region	Detail
Vi-tes	Leuven	Historic courier activity started in 2008.
Wevelgemse fietskoerier	Wevelgem	Part of the city's social economy, aiming to offer opportunities to the (long-term) unemployed. The bicycle couriers have been active weekly at local markets since early 2018.

Table 1: Cycle Logistics Carriers in Belgium in 2023

Mixed Carriers in Belgium

The table below highlights the important Mixed Carriers operating in Belgium in 2024.

	Region	Detail
Bpost	Belgium	Created in 1830, Bpost has the biggest number of carrier cycles and trailers in Belgium. They always used bicycles, began using e-bikes around 2010 and expanded to cargo bikes around 2020.
DHL	Antwerp	Opened their Belgian branch 1978 in Belgium and started with cycle logistics in 2016. Uses their personalised cubicycles in Antwerp. Tested other cities but stopped.
KGS	Brussels	Large logistics company founded in 2018 using carrier cycles among others in Brussels. They started to deliver by bike in 2022.
OnTime	Antwerp	Large logistics company using carrier cycles in Antwerp (principally in the port). Founded in 1997. They started to deliver by bike around 2010.
PostNL	Ghent	Started in Belgium in 1998 and they launched a pilot project with bicycles in 2023 in Ghent.

	Region	Detail
Urbeez	Belgium	Transporter exclusively operating with zero emission vehicles and therefore among others cycles. Started in 2019 and fully launched into bike delivery in 2020.
BD Logistics	Ghent, Antwerp and Brussels	Specialises in last-mile delivery solutions and urban logistics and started with cycle logistics in Ghent around 2020 with cargo velo. They acquired Foodsprint in September 2024 and are now considered as a Mixed Carriers.
Ziegler	Brussel	Their Cargobike XXL (load capacity of 800 kg) was inaugurated in September 2021 as part of the “Ziegler. Now Even Greener” programme.

Table 2: Mixed Carriers in Belgium in 2024 (non-exhaustive)

Transport Organizer (3PL)

The table below highlights the important Transport Organizers operating in Belgium in 2024.

	Region	Detail
SD Group	Brussels, Ghent and Leuven	Bicycle deliveries started in early 2020, beginning with OnTime and expanding with Urbike in Brussels and Ghent. They now also operate in Leuven.
DPD	Ghent	Focuses on parcel delivery and express shipping across Belgium. DPD works with Midori Group BV.
GLS	Deinze	GLS in Belgium manages business freight and parcels nationwide, shifting from mainly B2B to more B2C with rising e-commerce. They currently only use cargo bikes in Deinze in collaboration with ViaVelo.

Table 3: Transport Organizers in Cycle Logistics in Belgium in 2024 (non-exhaustive)

Scope and Methodology

The Cycle Logistics Barometer 2025 continues to focus on the market segment of Professional Carriers, encompassing the three types of carriers defined in the previous section: **Cycle Logistics Carriers, Mixed Carriers, and Transport Organizers.**

To establish a market overview and estimate the share of cycle logistics within the broader transport sector, we analyzed trends and quantitative insights related to urban logistics and parcel deliveries in Belgium.

This year we gathered additional insights through three key initiatives:

1. **Online survey of Professional Carriers**

   We conducted an online survey of Professional Carriers to garner data on organizational structure, delivery metrics, and operational performance. The survey was developed in coordination with the French and German federations of cycle logistics. Data collection took place between May and November 2025, targeting a sample of 25 representative companies of the industry : 14 Cycle Logistics Carriers, 11 Mixed Carriers and Transport Organizers.

2. **Specialized workshop with Logistics in Wallonia**

   We organised a specialized workshop with the support of Logistics in Wallonia, the regional competitiveness cluster dedicated to developing the transport and logistics sector in Wallonia. The workshop enabled a collaborative exploration of operational practices, challenges, as well as opportunities in cycle logistics.

3. **Legal and regulatory study with VIL**

   We conducted a legal and regulatory study in collaboration with the Flanders Institute for Logistics (VIL), which supports a wide range of Flemish logistics service providers, shippers, producers, retailers, suppliers, startups, IT companies, consultants, real estate players, training centers, and cities. This study provided significant insights into the legal framework affecting cycle logistics operations.

We analyzed quantitative data to identify trends and estimate market share. Insights from the workshop and legal study were reviewed to deepen our understanding of operational challenges, strategic decisions, and regulatory issues.

The combination of numerical data, qualitative insights, and the valuable contributions from work sessions with our Board and Advisory Board enabled us to formulate **recommendations for stakeholders** to support the growth and professionalization of cycle logistics in Belgium.

Market Overview of Urban Logistics

The road transport sector remains a cornerstone of Belgium's economy, employing **101,829 workers** in 2024 - roughly the same level as in 2023 - and benefiting from the presence of one of Europe's largest logistical gateways, the port of Antwerp. Logistics activity is particularly concentrated in Flanders, where 7,702 road transport organisations were established in 2024 (71.2%), compared to 2,116 organisations in Wallonia (19.6%) and 1.003 in Brussels (9.3%).[9]

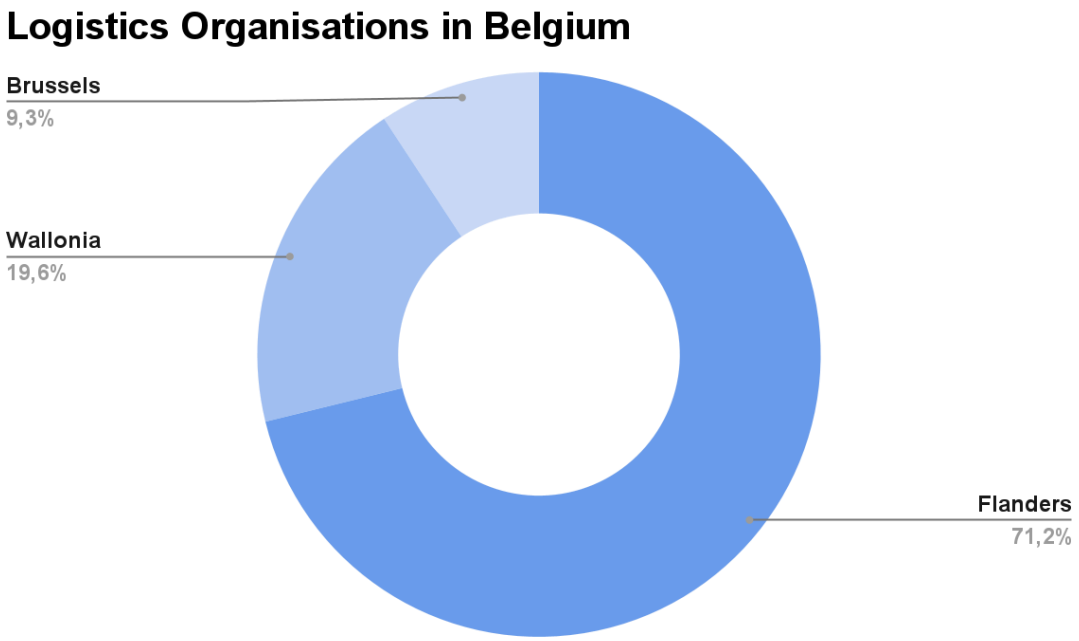


Figure 4 : Geographical distribution of logistics organisations in Belgium

Within this broad sector, the **last mile emerges as a distinct sub-branch**, focused on urban logistics operations. It encompasses the final step of the delivery process, where goods are transported from a distribution centre to the end customer. This segment is characterised by highly fragmented, dense flows, and typically g relies on smaller vehicles adapted to the complexity of urban environments. While strongly driven by the rapid growth of e-commerce, its relevance extends beyond online retail, reflecting broader changes in consumption patterns and the evolving mobility needs of modern cities.

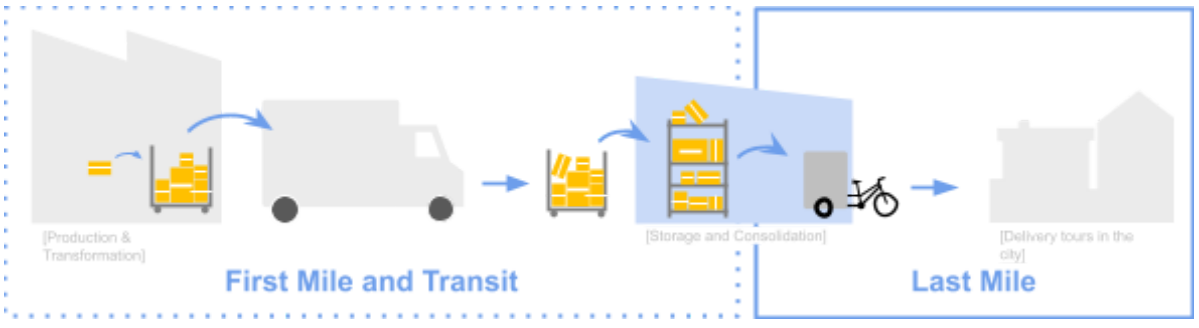


Figure 5 : The Last Mile in the logistics chain

[9] ITLB, Chiffres clés du secteur du transport routier de marchandises (2025).

The increasing volumes of goods and the rapid expansion of e-commerce have significantly reinforced the role of last mile logistics within the Belgian logistics landscape : the volume of the parcel market has been multiplied by 6 between 2010 and 2024[10]. In recent years, this segment has undergone profound **transformation**, driven by innovations in business models, new delivery modes, changing consumer expectations, and new urban areas access regulations.

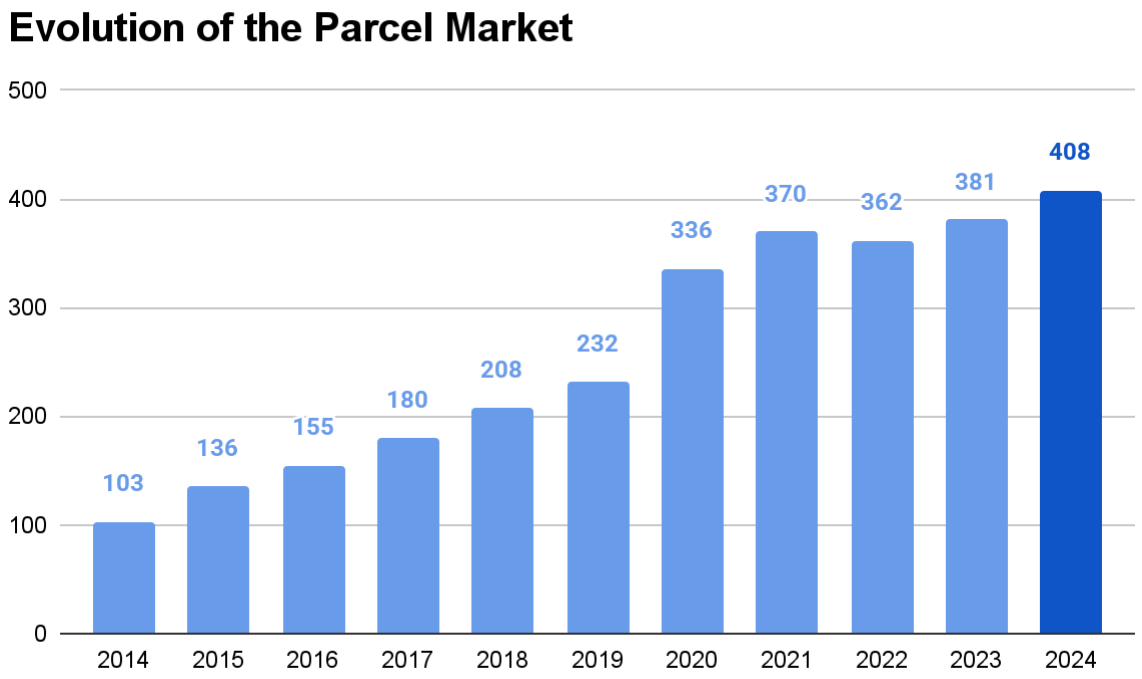


Figure 6 : Evolution of the parcel market in Belgium (in million units)

After a period of rapid expansion fuelled by the rise of e-commerce—and sharply accelerated by COVID-19—**the parcel market is now growing more slowly**. The most dramatic increase occurred between 2019 and 2020, when volumes surged from 232 to 336 million parcels. Since then, growth has levelled off, with only modest increases in the following years. This slowdown is visible both nationally, where the market has stabilised over the past three years, and at the European level, where the volume of goods transported by road declined by 0.7% between 2023 and 2024[11].

At the same time, the sector is facing mounting **social and environmental challenges**, including congestion, emissions of pollutants, and difficult employment conditions. In 2021, the external costs of road freight transport was estimated at **3.7 billion euros** in Wallonia alone[12] underscoring the scale of its societal impact.

Against this backdrop, the last mile plays a dual role: it is a key driver of economic growth, while increasingly becoming a focal point in regulatory and societal discussions. These dynamics provide the context for assessing the sector's recent progress and the challenges it must address going forward.

[10] BIPT. Postal market in full growth again in 2024 (2025).
[11] Eurostat. Drop in tonnes of freight carried on EU roads by 0.7% in 2024 (2025).
[12] Service Public de Wallonie - Mobilité et Infrastructures, Définition et validation des coûts liés aux externalités du transport de marchandises en Wallonie (2024).

Key progresses

The last mile logistics sector has firmly established itself as a central pillar of society, underpinning **both economic activity and the labour market**. It is a significant source of employment, with a growing number of companies and workers reinforcing its importance within the Belgian logistics landscape.

In recent years, the road transport sector has reached **a more mature stage of development**. Growth remains positive, but more moderate, with the number of enterprises increasing by around 1.0% and employment by 0.5%[13]. Parcel volumes also continue to expand, albeit at a steadier pace, reflecting a market that is consolidating after a prolonged period of rapid acceleration[14].

Progress has also been made in the field of **sustainability:** companies are electrifying their fleets of light commercial vehicles and deploying cargo bikes, not only in pilot and experimental projects, but also as part of their long-term strategies. These steps mark concrete progress towards reducing emissions and improving the sector's resilience in dense urban environments. However, the transition remains slow, with electric vehicles accounting for just 3.3% of new light commercial vehicle registrations by late 2024[15].

Collaboration and partnerships are also emerging as key drivers of change. This trend is notable in the private sector (e.g. a conventional carrier relying on a cycle logistics company for its urban flows), but also through growing public–private cooperation. Initiatives such as the Low Emission Urban Logistics Green Deal in Brussels and Flanders, illustrate how public authorities and private operators are jointly committing to the logistics transition. At the same time, more and more cities are recognising the negative impact of freight transport and are beginning to structure their urban logistics policies in a more strategic and coordinated manner, as demonstrated by Ghent's plan for sustainable logistics.

Finally, the **effectiveness of micro-mobility solutions** – most notably the cargo bike – is increasingly recognised in the scientific literature, supported in particular by the publication of comparative studies. Micro-mobility is now positioned not only as a means of reducing environmental impact, but also as a genuinely efficient logistics tool in its own right.

[13] FOREM, Transport & Logistics.
[14] BIPT, Annual Report (2024).
[15] ACEA, New commercial vehicle registrations (2025).

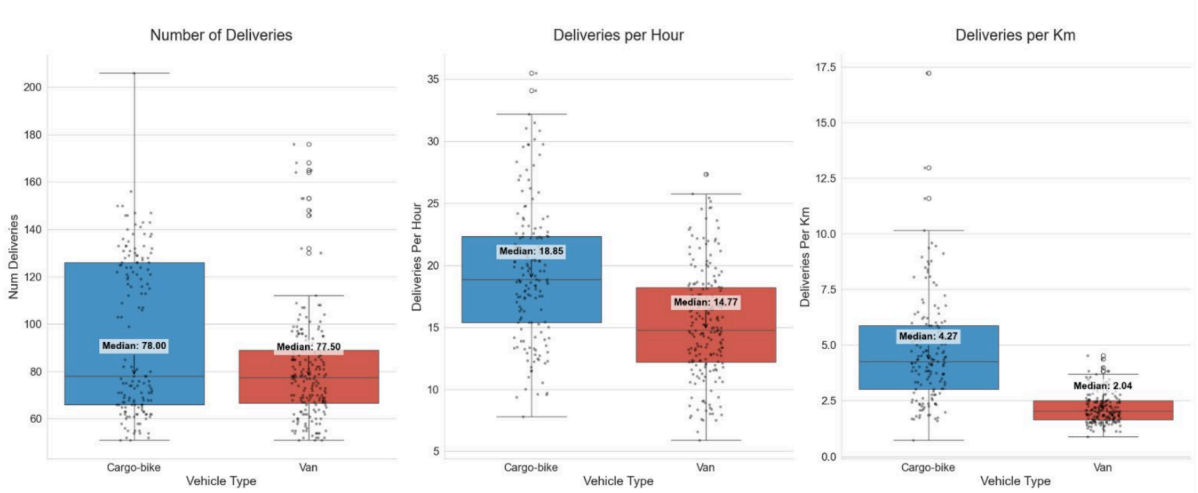


Figure 7 : Comparison of cargo bike and van delivery metrics[16]

Key challenges

Despite the progress achieved, the last mile logistics sector continues to face a number of structural challenges.

Urban deliveries remain **highly complex**, particularly in dense and regulated areas where access is limited using delivery time slots, pedestrian zones, or low-emission zones (LEZ). Congestion and parking difficulties add further operational constraints, significantly affecting efficiency and costs. Consumer expectations are also evolving: there is a growing demand for faster services, stricter delivery time slots, and higher quality standards. This trend further increases the complexity of logistics operations and adds pressure on cycle logistics operators, who must reconcile these requirements with already relatively low margins.

Another significant challenge in urban logistics is the **lack of comprehensive data**, which makes it difficult to measure the full scope and dynamics of the sector. The Belgian Institute for Postal Services and Telecommunications (IBPT), publishes data on parcel volumes and relevant industry trends, but only captures a fraction of the sector and does not focus on urban operations. This problem is exacerbated by the sector's fragmentations. Indeed, it comprises a very large number of companies, including many small operators and self-employed delivery workers, making systematic data collection very challenging.

The sector's business models remain vulnerable. In the area of B2C deliveries in particular, logistics services are frequently presented to the end customer as *free of charge*, which undermines the perceived value of the service and further intensifies price pressure. High labor costs further strain companies. Wage indexation for the road transport sector (CP 140.03) was 10.96% in 2023, 1.83% in 2024, and 3.57% in 2025[17]. These increases, following already high adjustments, are challenging for Belgian transport companies operating in a highly competitive international market.

[16] BCLF & Kale AI, Transforming Urban Deliveries: Data Evidence from Belgium's Cargo Bike Transition.
[17] SD Works, Indexation automatique des salaires (2025).

The number of bankruptcies in 2024 illustrates the structural weakness of transport and logistics companies. In 2024, ITLB reported a total of 307 bankruptcies in the professional sector of road goods transportation, a quarter of which occurred in the Brussels region[18].

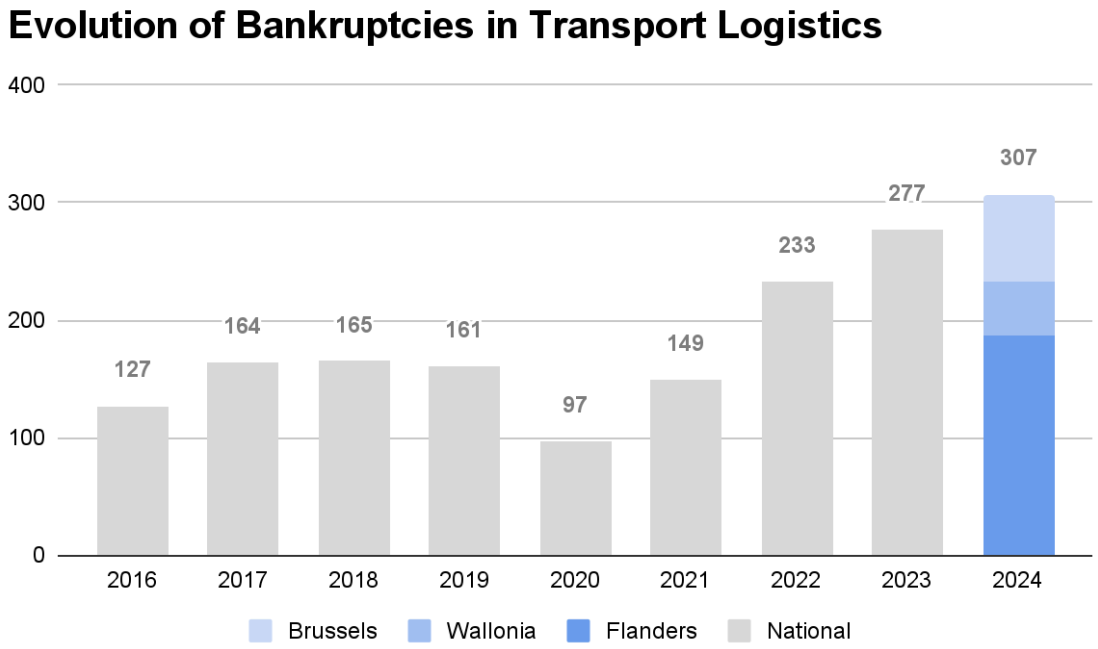


Figure 8 : Evolution of the number of bankruptcies in Belgium

Precarious working conditions and **labor shortages** – particularly among road drivers – remain a structural challenge for the sector. The share of salaried employment is declining (-1,9% between 2023 and 2024)[19], reflecting a growing reliance on subcontracting and self-employed contractors. Although platform-based work constitutes a distinct segment from the traditional road transport sector, it nonetheless accounts for more than 7.000 workers, most of whom are remunerated per task and have limited access to social protection[20]. As a result, the labour market is becoming increasingly fragmented creating the conditions that allow less favourable social norms to emerge. These practices raise concerns about social sustainability and pose risks for long-term workforce development.

Finally, although the transition towards greener and more resilient operations has begun, **progress remains slow.** Modal shift and electrification are still insufficient to reach European decarbonisation objectives[21]. Profitability pressures and short-term survival often take precedence, delaying the adoption of more sustainable models and technological innovations. For many companies, the priority lies in safeguarding the viability of their business models and maintaining competitiveness is the primary concern - particularly in a market where unfair competition persists, with some operators not subject to labour regulations or sustainability requirements. In addition, the sector continues to lack

[18] ITLB, Nombre de faillites dans le secteur professionnel du transport de marchandises par route (2025).
[19] ITLB, L'évolution conjoncturelle dans le secteur du transport professionnel routier de marchandises (2025).
[20] Federal Public Service Mobility & Transport, L'économie du vélo en Belgique et son influence sur la situation socio-économique du pays (2024).
[21] Climat.be, Baromètre de la transition : Où en est la Belgique dans sa transition vers la neutralité climatique en 2050 (2025).

large-scale demonstrators capable of proving the feasibility of alternative solutions. Many companies face limited access to information or insufficient knowledge of available sustainable solutions. Together these factors contribute to a cautious and fragmented transition, despite the growing urgency of environmental and societal challenges.

Impact and Externalities of Urban Logistics

Economical impact

As highlighted in the previous sections of our Barometer, urban logistics plays a **central role in the Belgian economy**, both in terms of employment and its contribution to the functioning of commerce and distribution. In 2024, the transport and logistics sector employed **over 101,000 people**, a significant portion of whom are active in urban logistics, whether in last-mile delivery, warehouse management, or route planning[22]. This sector forms a crucial link between businesses and their customers : according to the IBPT, **408 million parcels** were delivered in Belgium in 2024, highlighting its strategic role in connecting retail, B2B services, and end consumers[23].

From an economic perspective, the sector is marked by **strong price pressure** and the widespread **illusion of 'free' deliveries,** both of which reduce operator profitability and undermine the long-term sustainability of business models, increasing the risks of bankruptcies. Although customers increasingly expect fast delivery, they are often unwilling to pay its real cost. Studies show that consumers' willingness to pay for delivery services is typically represents a fraction of the actual price[24]. While urban delivery continues to expand rapidly, the segment remains highly exposed to intense competition, fluctuating demand, and rising energy and operational costs making its economic foundations particularly fragile.

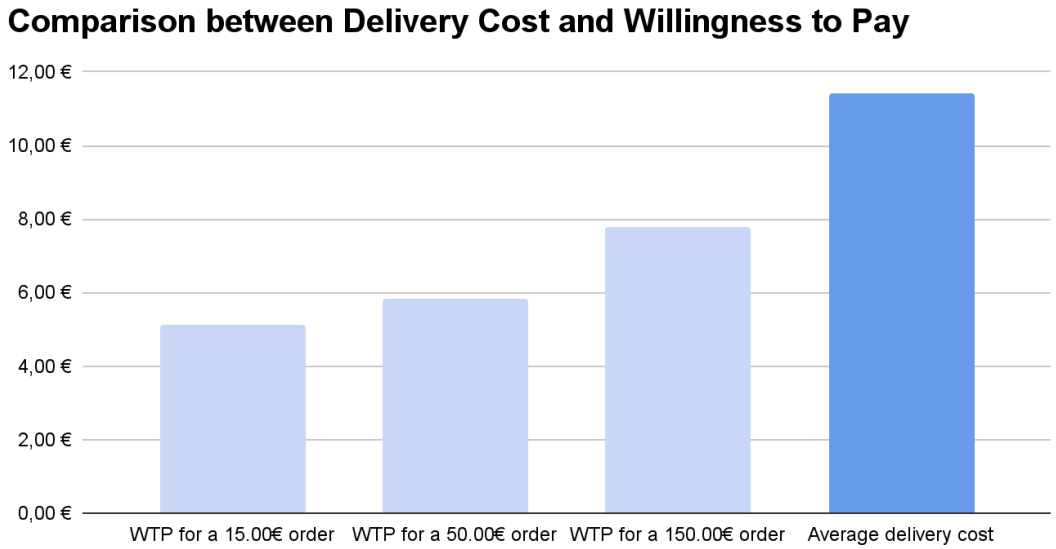


Figure 9 : Proportion of congestion in transport cost for national courier services

[22] ITLB, Chiffres clés du secteur du transport routier de marchandises (2025).
[23] BIPT, Postal market in full growth again in 2024
[24] Sendcloud, Tour d'horizon de la livraison E-commerce (2023) ; Capgemini Research Institute, The last-mile delivery challenge (2019). Note : the cost estimated in 2019 has been adjusted for inflation to make it comparable to the 2024 data.

Finally, **transport and logistics companies both contribute to - and are adversely affected by growing traffic congestion**, particularly in major urban areas. **Congestion is estimated to account for up to 7.35% of transport costs**, undermining productivity and reducing the reliability of delivery operations. This share has continued to rise over the past four years, increasing 2,35% and further intensifying the operational pressures faced by the sector.[25]

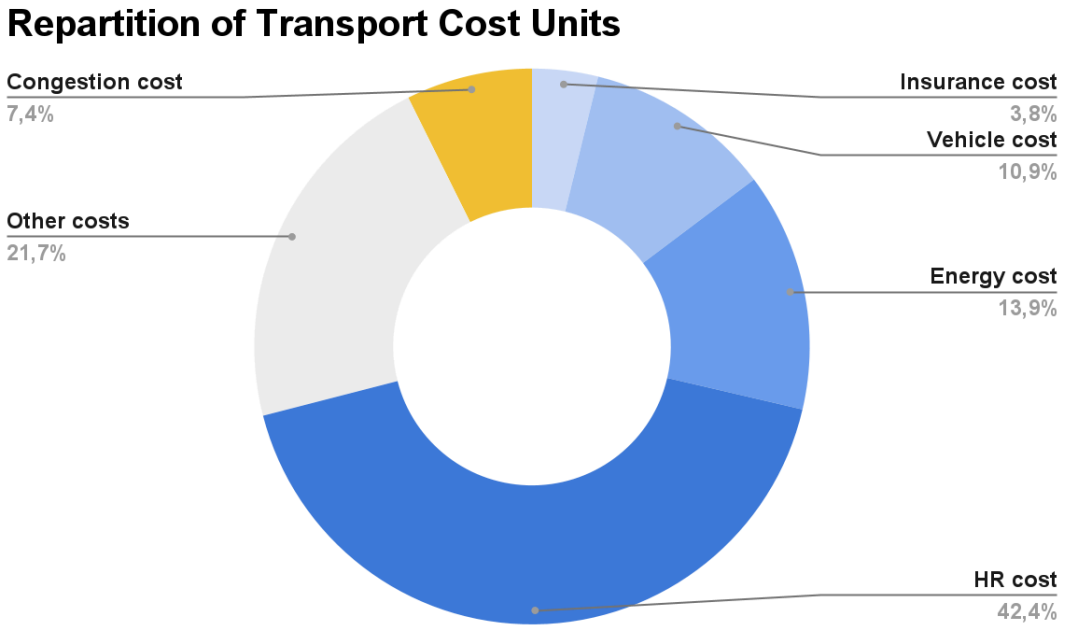


Figure 10 : Proportion of congestion in transport cost for national courier services

Despite these challenges, urban logistics remains a critical pillar of Belgium's economic competitiveness and an essential enabler of commercial activity. However, ensuring its long-term sustainability will require **a shift toward more efficient, resilient and environmentally responsible operational models**.

Societal impact

Urban logistics, while essential for economic activity and the functioning of cities, generates substantial societal costs that are not borne directly by transport and logistics companies. These include **public health impacts**, **environmental degradation**, **road congestion**, **accidents**, and **contributions to climate change**. Such negative externalities are largely absorbed by citizens and public authorities, through healthcare costs, reduced productivity, and the upkeep of transport infrastructure.

Congestion represents a particularly significant challenge. As noted earlier, logistics operations both contribute to and are affected by urban traffic, slowing deliveries, affecting other road users and reducing the overall efficiency of urban mobility. Part of this cost is absorbed internally by logistics organizations through operational inefficiencies and additional time spent in traffic, the majority is borne by society. The **external congestion cost of a motorised logistics vehicle is estimated to exceed 1,00€ per kilometer - a**

[25] ITLB, Chiffres clés du secteur du transport routier de marchandises (2025).

substantial burden with wide-ranging implications[26].

Public health implications represent another major societal concern. **Air and noise pollution** from vehicles significantly reduce the quality of life in cities, contributing to respiratory illnesses, stress, and broader public-health burdens. **Accidents** caused by logistics vehicles, from minor collisions to severe crashes, further amplify these costs. Depending on the vehicle type, the external costs related to accidents, air and noise pollution vary between 0,0042€ for cargo bikes to 0,0380€ for trucks per kilometer[27].

In 2023, the transport sector accounted for **25.1 % of total greenhouse gas emissions in Belgium**, making it the country's most polluting sector ahead of the energy industry (15,9%) and process industry (15,6%)[28]. In addition, road transport represents 96% of total domestic transport emissions[29].

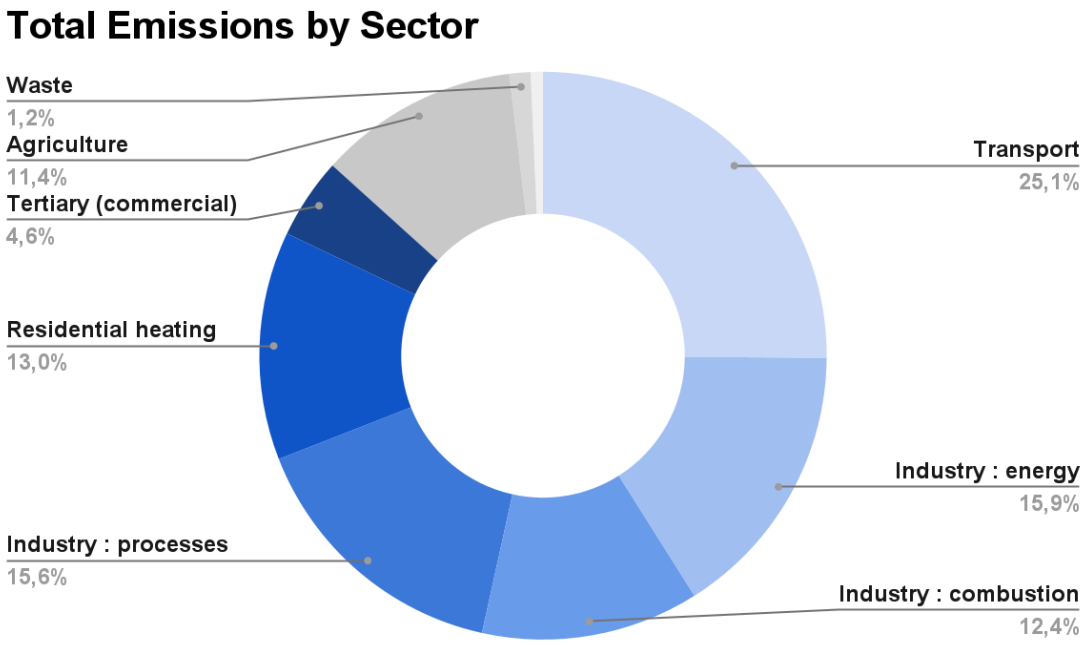


Figure 11 : Repartition of emissions of pollutant by sector

While it is difficult to separate emissions specifically from freight transport, European data on vehicle types show that **light-duty vehicles** (including larger private cars and service vehicles) and **heavy trucks** together generate more than half of transport-related emission[30]. Despite the increasing adoption of cleaner technologies, the transport sector remains heavily reliant on fossil fuels, which continues to slow decarbonisation efforts and underscores the urgent need for substantial investment in sustainable transport solutions.

[26] VUB MOBI, Mobility, Logistics & Automotive Technology Research Centre (2023).
[27] VUB MOBI, Mobility, Logistics & Automotive Technology Research Centre (2023).
[28] Climat.be, Émissions par secteur (2023).
[29] ibid.
[30] EIB, Comment adapter les transports pour un avenir durable (2022).

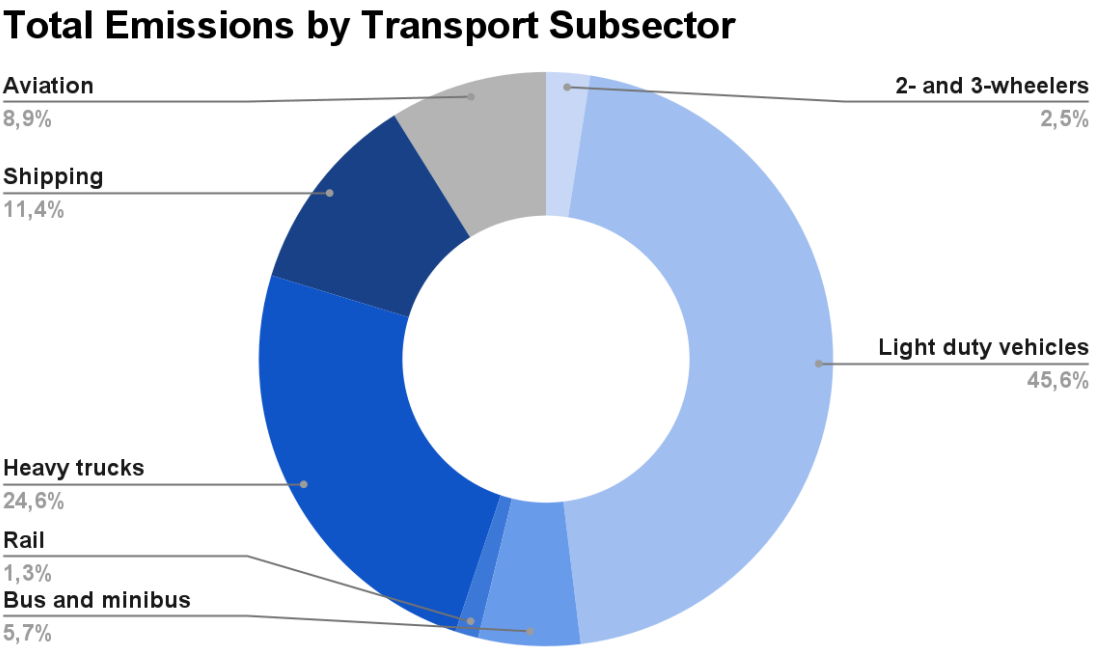


Figure 12 : Repartition of emissions of pollutant by transport subsector

In conclusion, while urban logistics underpins commerce and access to goods, it imposes multiple societal costs, reinforcing the need of **transitioning toward more sustainable, low-emission modes**

Key Takeaways - the Transport Sector

101,829 transport workers (ITLB, 2024)

Making it one of the most important sector in terms of employment in Belgium.

307 bankruptcies (ITLB, 2024)

Reflecting some form of instability and fragility of a sector despite its rapid evolution.

408 million parcels (BIPT, 2024)

Logistics plays a key role in the value chain, connecting production and processing to end consumers.

Congestion cost (ITLB, 2024)

Internal costs for logistics organisations, representing up to 7.35% of transport cost items.

Billion € of external cost (SPW, 2023)

Not covered by transport and logistics companies, but rather by society as a whole.

Alarming working conditions

The number of employees is declining, with subcontracting and self-employment becoming common practices.

Status and trends of Cycle Logistics Sector

Key figures of the sector

In this section, we present the key figures and trends for the Cycle Logistics sector in Belgium for 2024.

Our online survey captured input from 71% of Belgian Cycle Logistics Carriers, 73% of Mixed Carriers and Transport Organizers combined. In total, 10 out of 14 main Cycle Logistics Carriers, 8 out of 11 Mixed Carriers and Transport Organizers provided data. Overall, 72% of all targeted respondents contributed, offering a representative overview of the sector and enabling the identification of key trends between 2023 and 2024. For organizations that did not respond, we applied conservative estimates based on data reported in previous years.

This report focuses on trends, which serve as leading indicators for the evolution of the cycle logistics sector. The figures presented should be considered as robust estimates, that give a good representation of the sector. Wherever possible, consolidated absolute figures are included to offer a more accurate and detailed description of sectoral developments.

In the following sections, results are presented either separately for Cycle Logistics Carriers, Mixed Carriers, and Transport Organizers combined when differences are noteworthy, or jointly when trends are consistent across the groups. This approach ensures a clear and coherent overview highlighting specific patterns and developments within each segment.

Nature of deliveries

Our goal is to understand what types of deliveries are being handled by cycle logistics operators, regardless of the volume. As in previous editions, we focus here on primary deliveries, the main types of goods or services carried by our respondents. The data has been consolidated without weighting for the delivery volumes of individual participants.

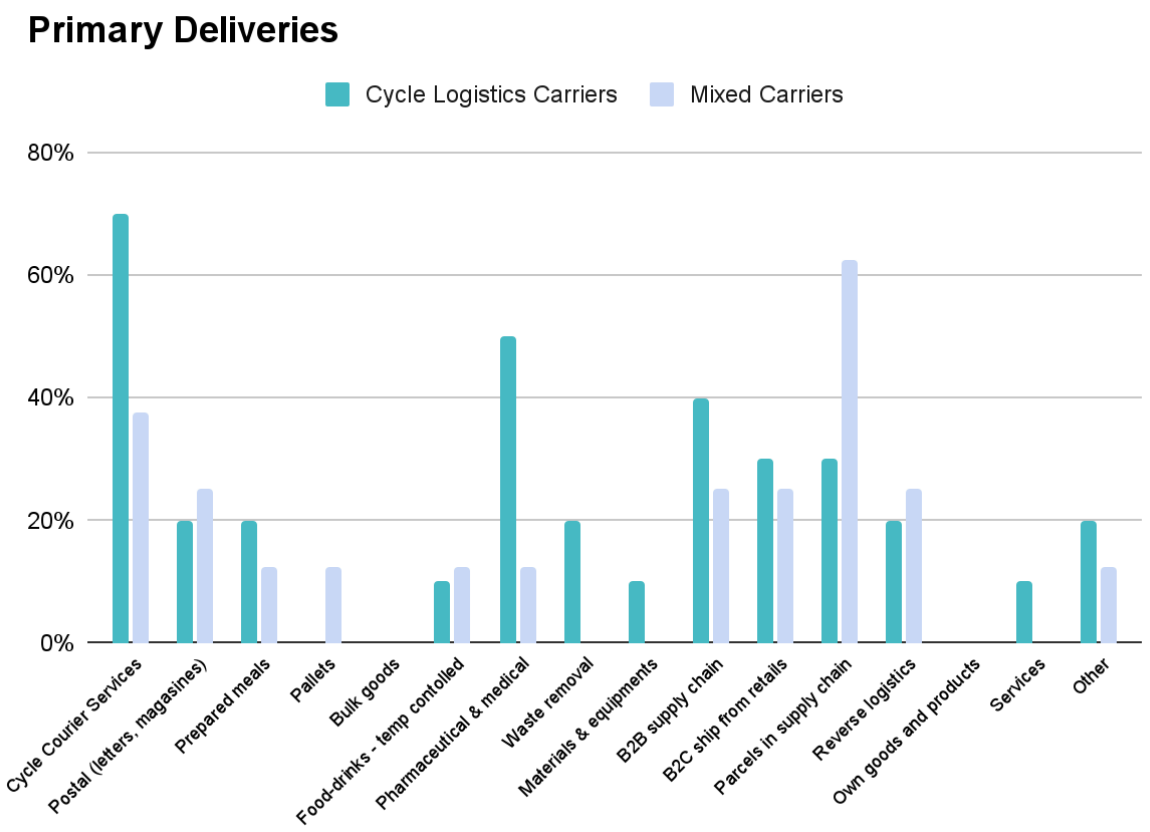


Figure 13 : Primary delivery types in the cycle logistic sector in 2024.

The primary deliveries of Cycle Logistics Carriers continue to highlight the sector's versatility and its strong presence in fast, localised transport services. In 2024, **Courier** Services remained the dominant activity, with 70% of operators identifying them as their main business. This underlines the continued importance of point-to-point and on-demand transport within urban logistics where speed and flexibility are critical to meeting customer expectations.

A significant share of **Cycle Logistics Carriers** also provide **pharmaceutical and medical deliveries (50%**), underscoring the sector's vital role in handling time-sensitive and high-reliability consignments. Other notable categories include **B2B supply chain deliveries (40%)**, **parcel deliveries (30%), B2C deliveries from retail (30%)**, postal deliveries (20%), prepared meals (20%), and reverse logistics (20%) and waste removal (20%). This diversity reflects the sector's expanding service portfolio. Smaller but still important shares include temperature-controlled deliveries of food & drinks (10%), materials and equipment (10%), and various services (10%), demonstrating the adaptability of the sector to niche markets and tailored services.

By contrast, the **Mixed Carriers** segment continues to concentrate **more heavily on parcels within the supply chain (63%)**, confirming their strong integration in larger e-commerce and logistics networks. **Courier services (38%), postal deliveries (25%), B2B supply chain deliveries (25%), B2C deliveries from retail (25%) and reverse logistics (25%)** also remain key activities, highlighting their dual role in both forward and return flows.

Mixed Carriers display a narrower service mix, with limited involvement in pharmaceutical, food, or specialised deliveries compared to Cycle Logistics Carriers.

The inclusion of 'secondary deliveries' further illustrates the broad range of goods cargo bikes can transport. For instance, Cycle Logistics Carriers are increasingly able to deliver bulk items and pallets, unlocking new potential for efficient urban deliveries with the help of pallet-compatible trailers.

Overall, the 2024 results reaffirm the distinct positioning of **Cycle Logistics Carriers as specialists in high-frequency, proximity-based deliveries**, while **Mixed Carriers primarily extend their existing parcel and e-commerce operations onto cargo bikes**. This differentiation reflects the sector's evolution and growing segmentation according to delivery type, client base, and operational model.

Number of Parcels Delivered

The total number of deliveries of parcels equivalents delivered in 2024 by the cycle logistics sector is estimated at **5,250,500**, marking a significant increase from 3,031,537 deliveries in 2023. This represents **a 70% increase** in delivery volumes over the past year.

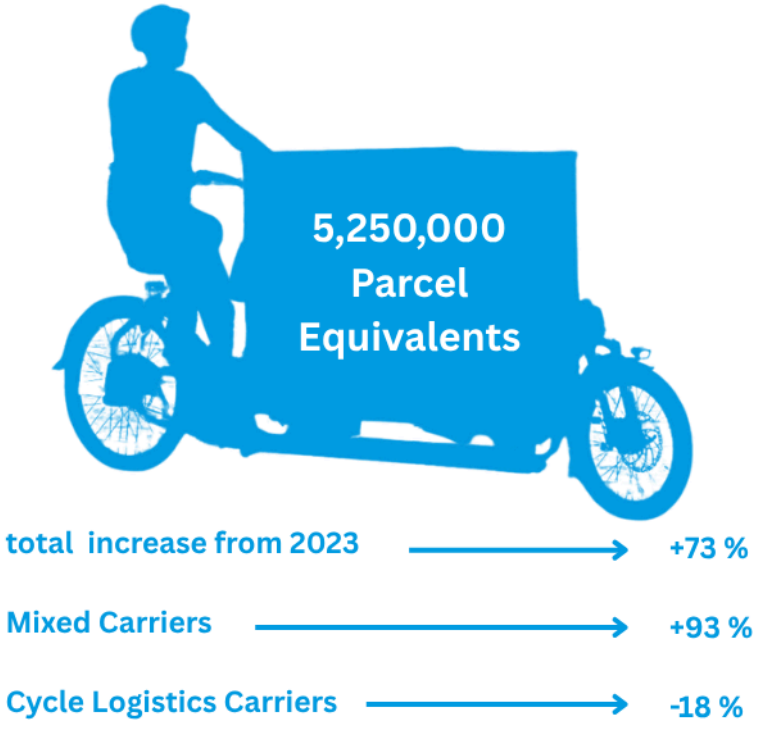


Figure 14: Total Parcel equivalents evolution from 2023 to 2024.

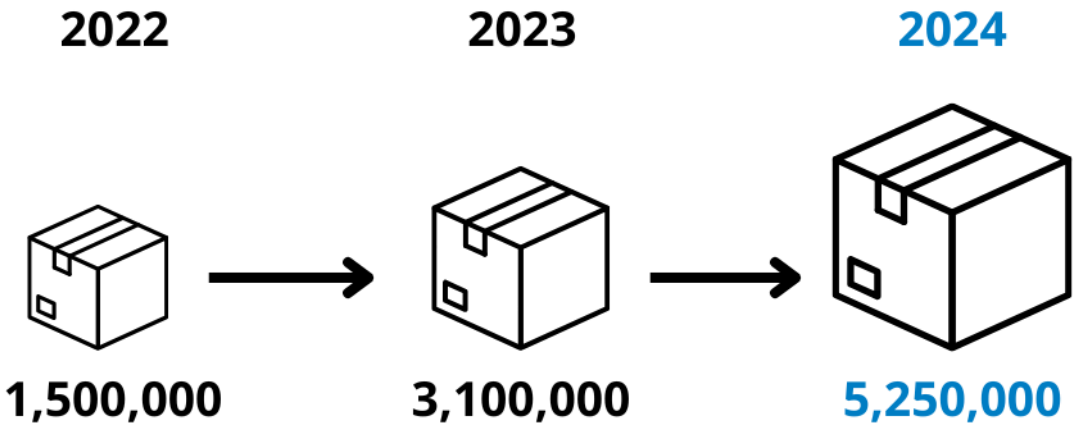


Figure 15: Parcel equivalents evolution from 2022 to 2024.

While the sector as a whole continues to expand rapidly, the growth patterns differ significantly between carrier types. **Mixed Carriers now handle 91% of total deliveries**, which constitutes a remarkable 90% increase in volume (up from 80% in 2023). This surge is largely fuelled by the integration of bicycle deliveries into e-commerce parcel flows.

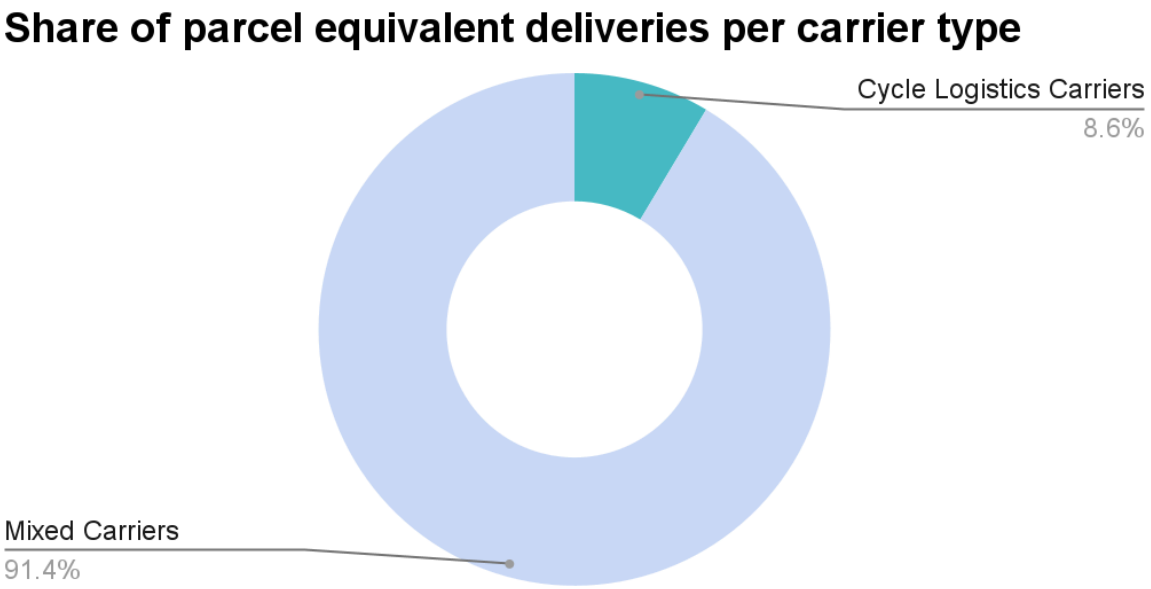


Figure 16: Parcel equivalents percentages of Cycle Logistics Carriers *compared to Mixed Carriers.*

In contrast, **Cycle Logistics Carriers recorded an 18% decline in delivery volumes**, with their share falling from 20 % in 2023 to 8.6% in 2024. This decrease reflects both a **strategic repositioning towards higher-added value, service-oriented operations** -such as specialised, medical, or proximity-based deliveries- and the closure or consolidation of several smaller operators over the past year. As a result, Cycle Logistics Carriers now have a smaller presence in the e-commerce market, which generates the highest parcel volumes. It is important to note that this represents a limitation of our study: we measure volumes, not revenues. A decline in delivered volumes does not necessarily imply a reduction in the revenues of Cycle Logistics operators.

Out of the 408 million parcels delivered in Belgium (IBPT), about 5.25 million were delivered by bike. This means Cycle Logistics currently accounts for roughly 1.3% of the overall parcel market and about 2.3% of deliveries in urban areas.

These figures should be regarded as indicative rather than scientific. They are based on the assumption that the 56% of Belgians living in urban areas[31] also generate 56% of all parcel deliveries. If we further consider that approximately 25%[32] of goods transport could potentially be done by cycle logistics -and assume this share also applies to professional carriers- it becomes evident that the sector still holds significant untapped potential.

Moreover, cycle logistics is expanding at a faster pace than the parcel market as a whole, demonstrating how sustainable delivery methods could capture a significantly larger share of urban shipments in the future.

Cities

The 2024 data show the same top three cities as last year. **Brussels continues to dominate the market, accounting for 57% of cycle logistics deliveries, followed by Ghent with 10% and Antwerp with 7.5%.** These top three cities are followed by Mechelen (3%), Roeselare (3%), Ostende (3%), Brugge (2.5%), Liège (2%), Leuven (2%), and Tournai (1.5%).

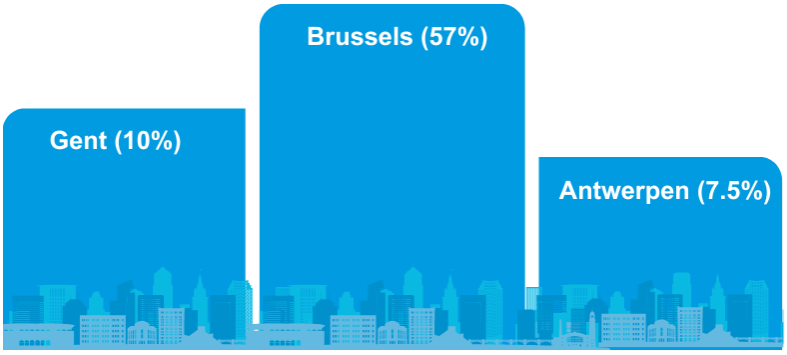


Figure 17: Podium of the Share of total bike deliveries per City in 2024.

Last year, Brussels held approximately 60% of the total market share of bike deliveries, with Antwerp and Ghent accounting for approximately 10% each . Whereas the overall ranking remains unchanged, a number of Mixed Carriers in Ghent as well as in Antwerp are broadening their activities, which may have influenced the slight shifts in distribution between the cities.

Regional perspective

From a regional perspective, the **Brussels-Capital Region** continues to dominate the sector, accounting for 57.3% of all cycle logistics activities in Belgium. This strong

[31] Lieve Vanderstraeten and Etienne Van Hecke (2019). Belgian Urban Regions.
[32] 25% is the potential of cycle logistics of all professional delivery trips for the transport of goods in cities, while 33% is the potential when including the professional delivery of services

concentration reflects the city's dense urban fabric, high delivery demand, and the implementation of policies encouraging sustainable urban transport. The expansion of cycling infrastructure and the restrictions on motorised traffic, - such as the Low Emission Zone (LEZ) and pedestrian areas), further support the shift towards cargo bikes. Although Brussels' share has slightly decreased compared to last year, it remains by far the leading region in terms of volume and market maturity.

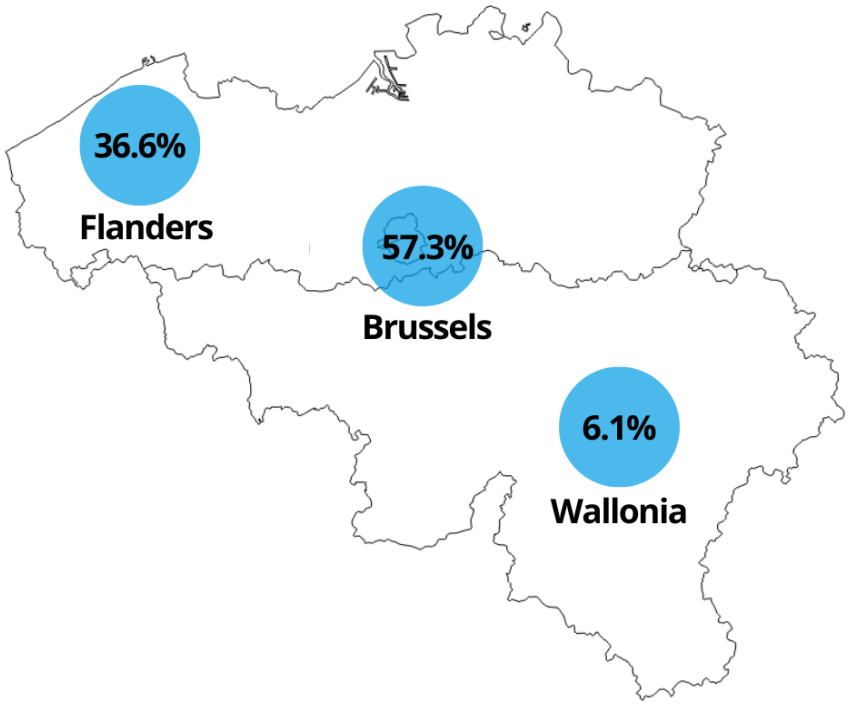


Figure 18: Share of total bike deliveries per region in 2024.

In **Flanders**, the share of cycle logistics activities has seen a modest increase, reaching 36.6%. Although no new actors have entered the market, several existing companies have grown significantly, consolidating their positions and broadening their service coverage. This reflects a phase of scaling up rather than diversification, with Mixed Carriers, who already manage large volumes, now deciding whether to increase the share of deliveries performed by bike. For Cycle Logistics Carriers, achieving similar growth requires expanding volumes and operational capacities, a process which typically takes more time. Overall, Flanders remains a region with solid foundations and considerable room for further growth, particularly in medium-sized cities where urban density and logistics demand continue to rise.

Wallonia has also recorded a notable increase in its share of the national market, rising from 5% in 2023 to 6.1% in 2024, largely due to the growth of activities by Mixed Carrier operators. While this signals positive momentum, the overall level of cycle logistics activity in Wallonia remains modest compared to its urban potential. Several large cities, including Charleroi, Tournai, and Mons, still have limited or no cycle logistics presence, pointing to substantial opportunities for future expansion in the region.

Kilometers cycled

In 2024, the total number of kilometres cycled almost reached 10,7 million, representing a **significant 30% increase compared to 2023**. This growth was primarily driven by Mixed Carriers, which expanded their activity by 32%, while Cycle Logistics Carriers recorded a more modest growth of 8%, reflecting both the strategic downsizing of certain operators and the closure or consolidation of small .

Delivery volumes also show notable progress in efficiency. Overall **delivery density** (measured as kilometers per parcel equivalent) **improved from 2.6 km/parcel in 2023 to 2 km/parcel in 2024**. This improvement is mainly driven by Mixed Carriers focused on e-commerce, while Cycle Logistics Carriers registered a slight reduction in density as they increasingly prioritise higher-value, specialized deliveries over volume.

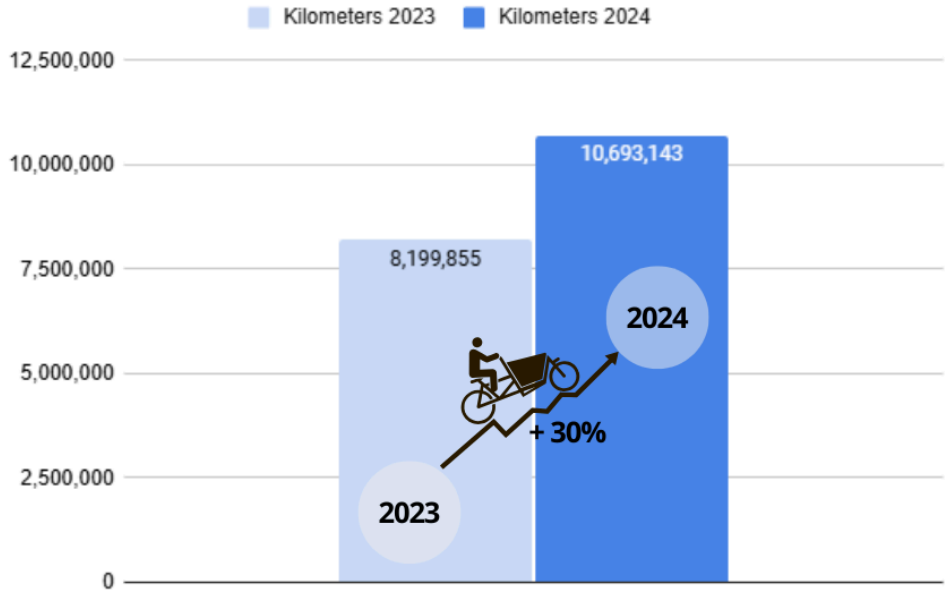


Figure 19: Amount of km cycled in 2024 compared to 2023

Mixed Carriers now account for 93% of the total kilometres (last year 91%), highlighting their major contribution to overall cycling activity. Last year, our members cycled the equivalent of 10 trips to the moon and back; this year, the total distance cycled is equivalent to nearly **14 lunar round trips,** illustrating the remarkable expansion in cycling activity over the past year.

Figure 20: Amount of km cycled in 2024 (to the moon)

Workforce

Employment trends in cycle logistics showed variation in 2024, reflecting broader sector-wide shifts. Reported figures are higher than in previous years, primarily because the study now includes personnel engaged in postal services - delivering letters, magazines, and papers - using bikes and cargo bikes.

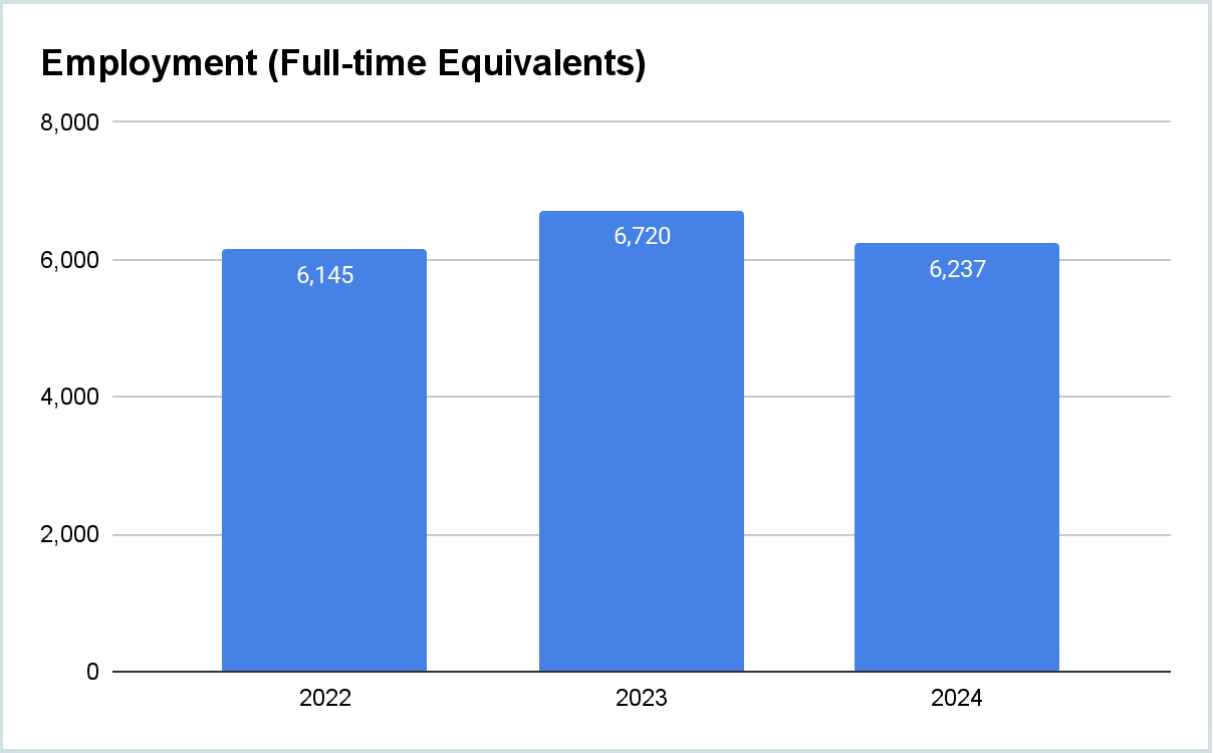


Figure 21: Total workforce evolution for the Cycle Logistic actors in Belgium from 2022 to 2024.

Employment in cycle logistics has experienced notable fluctuations in recent years. The sector expanded by approximately 9% between 2022 and 2023, before contracting by around 7% in 2024.This variation reflects a combination of factors highlighted earlier, including slower overall freight growth, declining volumes of letter deliveries, rising operating costs, financial pressures, and sector-specific dynamics such as retirements and acquisitions. Despite the recent dip, employment remains well above pre-2020 levels, showing the sector's resilience amid broader economic and industry challenges.

In 2024, **for the first time since 2020, the total number of people employed by Cycle Logistics Carriers declined.** After several consecutive years of growth, **the workforce contracted by 8.9%.** This trend is due to a combination of factors: the retirement of a number of operators, the acquisition and subsequent restructuring of one company, and a reduction in activity levels among other businesses .

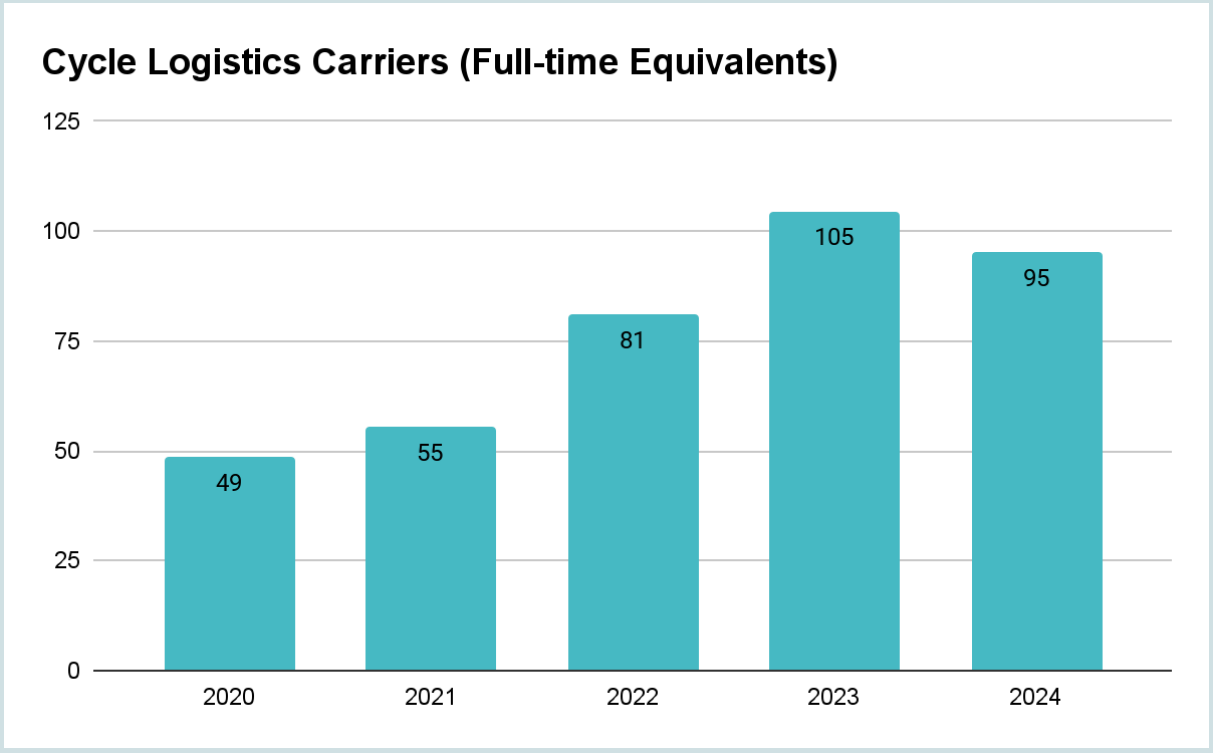


Figure 22: Workforce evolution for the Cycle Logistic Carriers in Belgium from 2020 to 2024.

After a steady increase in employment between 2022 and 2023, **the total number of people employed by Mixed Carriers declined in 2024, falling from 6,615 to 6,142 (-7.2%%).** This decline comes after a year of growth across nearly all operators. The decrease can largely be attributed to a reduction in postal services, while the other deliveries maintained stable employment levels or recorded modest increases.

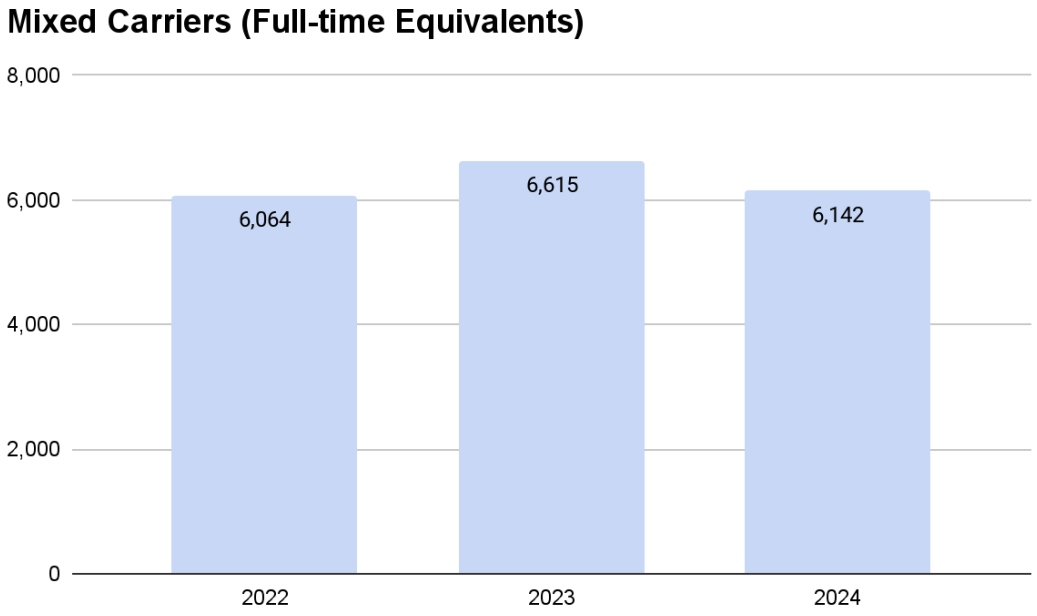


Figure 23: Workforce evolution for the Mixed Carriers in Belgium from 2022 to 2024.

Despite contractions in certain areas, employment levels remain higher than in 2022, underscoring the continued relevance of Mixed Carriers in Belgium's urban logistics landscape. The overall trend in 2024 is shaped by a decline in postal service employment, while Mixed Carriers (who account for approximately 98% of total sector employment, including letter distribution) continue to sustain strong activity.

The decline in cycle logistics FTEs in 2024 reflects multiple converging factors. Specific issues such as reduced activity, acquisitions and retirements intersect with broader industry dynamics, including the sharp slowdown in European freight growth, stagnating employment in road transport, and a rise in bankruptcies driven by fuel, labor, and maintenance cost pressures. High labor costs and repeated wage indexations further constrain hiring in an already competitive market.

Nevertheless, the cycle logistics workforce remains well above pre-2020 levels, demonstrating resilience while also highlighting the sector's sensitivity to wider economic and industry trends.

Workforce Composition in Cycle Logistics

The composition of the workforce is steadily evolving as organizations balance the stability of direct employment with the flexibility offered by freelance contracts to meet their operational needs. **Within the Cycle Logistics sector, however, the workforce remains predominantly composed of directly employed staff reflecting the importance of reliability and continuity in service delivery.**

Among **Cycle Logistics Carriers** the workforce remains predominately composed of directly employed staff. In 2024, **80% of carriers reported having no freelancers**, up from around 66% the previous year. Freelancers are engaged by a relatively small share of carriers (approximately 20%) to provide operational flexibility, but no Cycle Logistics organisation relies on them for more than half of its workforce.

By contrast, Mixed Carriers are increasingly turning to freelance labour. Only 67% now report having less than 10% freelancers, compared to 80% last year, while 17% of carriers employ freelancers for more than half of their workforce. This reflects a growing reliance on flexible staffing models within .

Overall, while both sectors continue to rely primarily on direct employment, freelance contracts are becoming increasingly important for operational flexibility, particularly among the Mixed Carriers.

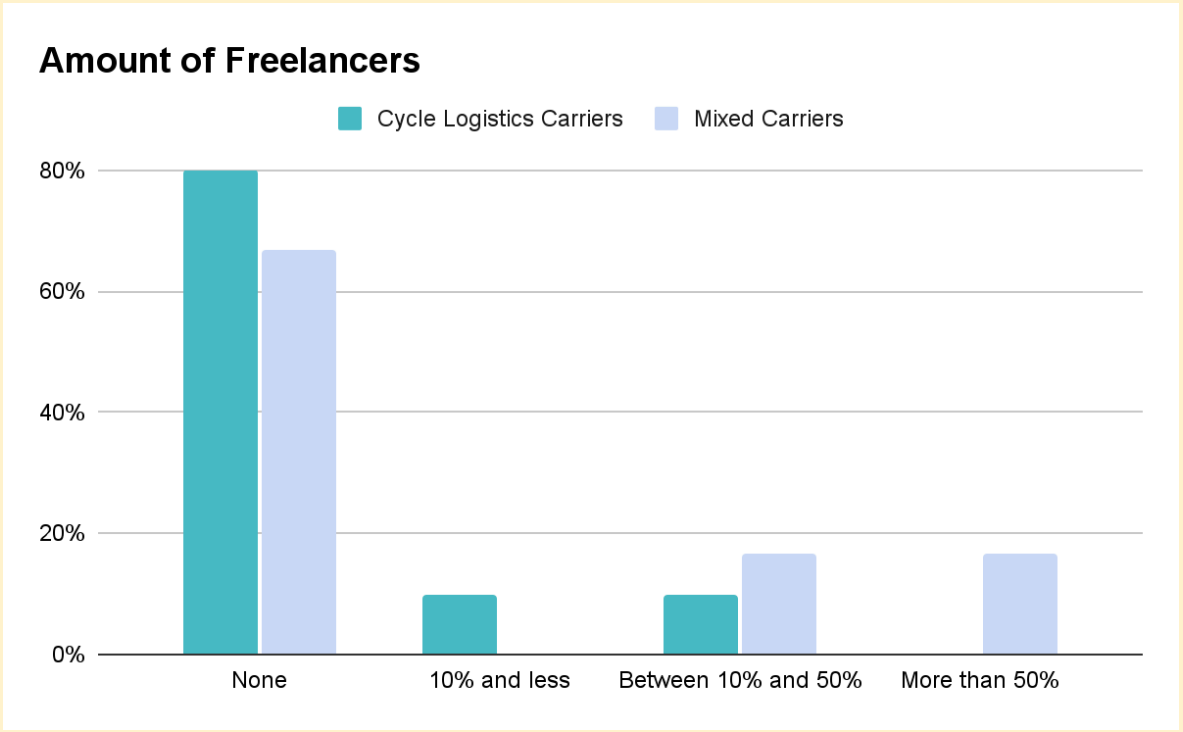


Figure 24: Percentage of freelancers amongst Cycle Logistic Carriers & Mixed Carriers in 2024.

In summary, the Cycle Logistics sector employs primarily salaried employees, whereas Mixed Carriers are increasingly integrating freelancers into their workforce. This trend highlights the sector's ongoing adaptation to dynamic workload demands while continuing to uphold fair employment practices.

Diversity

Gender diversity continues to be a significant challenge in the cycle logistics sector.

2024 data shows a slightly broader distribution across the categories, but overall progress remains limited. The share of businesses employing exclusively male staff decreased, from 33.0% to 25.5%. Firms with 10% or fewer non-male staff rose from 33.0% to 43.8%. Representation in the middle ranges remained largely unchanged, 12.5% reported 10–25%, and 18.8% reported 25–50% non-male employees. Notably, no organisations reported having a majority of non-male staff in 2024 (down from 11% in 2023).

Looking more closely at the 2024 data, differences emerge between Cycle Logistics Carriers (CL) and Mixed Carriers (MC):

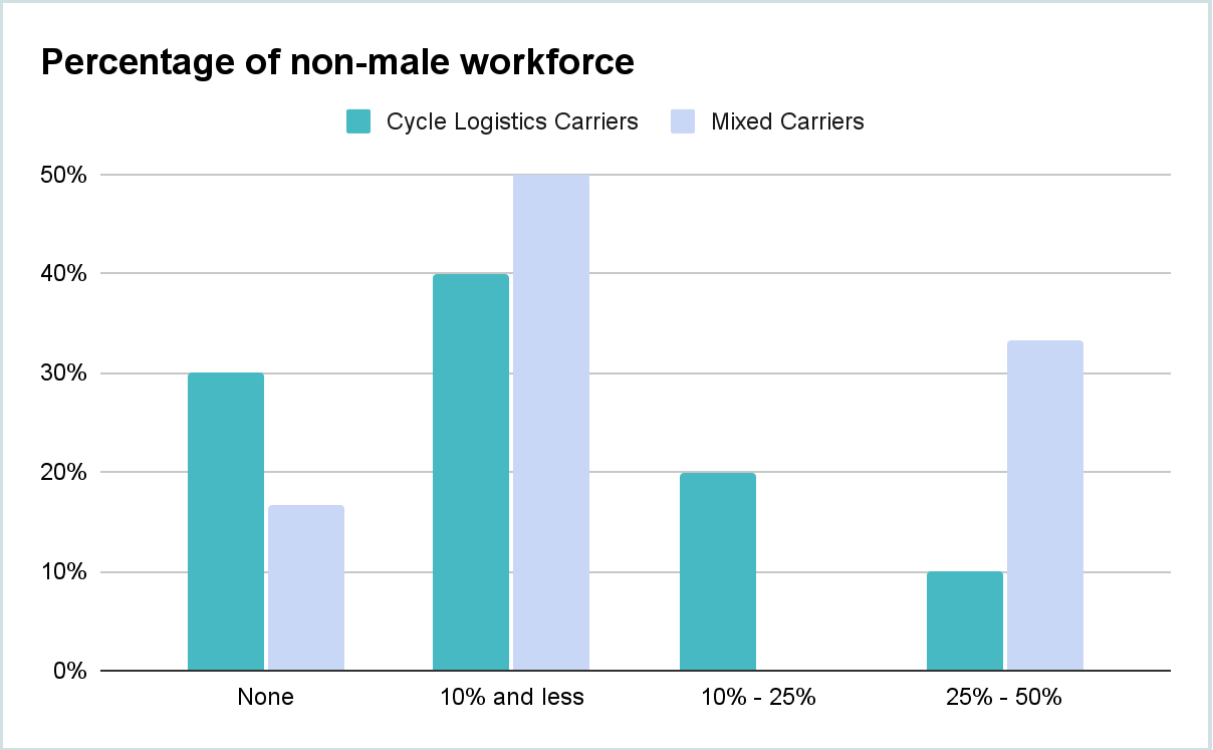


Figure 25: Differences emerge between Cycle Logistics Carriers and Mixed Carriers in 2024

Among Cycle Logistics Carriers, more than two-third (70%) of organisations report 10% or fewer non-male staff, underscoring the limited gender diversity within this group. In contrast, Mixed Carriers show greater representation in the 25–50% range (one third of companies) in comparison with Cycle Logistics Carriers (10% of organisations), though Mixed Carriers too have a high share of companies (two thirds of companies) with little to no non-male participation.

Overall, the comparison highlights that while a few organisations have made incremental progress—particularly in moving into the 25–50% category—the sector as a whole continues to exhibit a pronounced gender imbalance. The disappearance of companies with majority non-male representation in 2024 suggests that progress remains uneven and fragile.

Diversity in Transport

Gender disparities remain pronounced across the transport sector, both in the EU and globally. Although the situation has improved slightly in recent years, women continue to be significantly under-represented, especially in road and land-based transport.

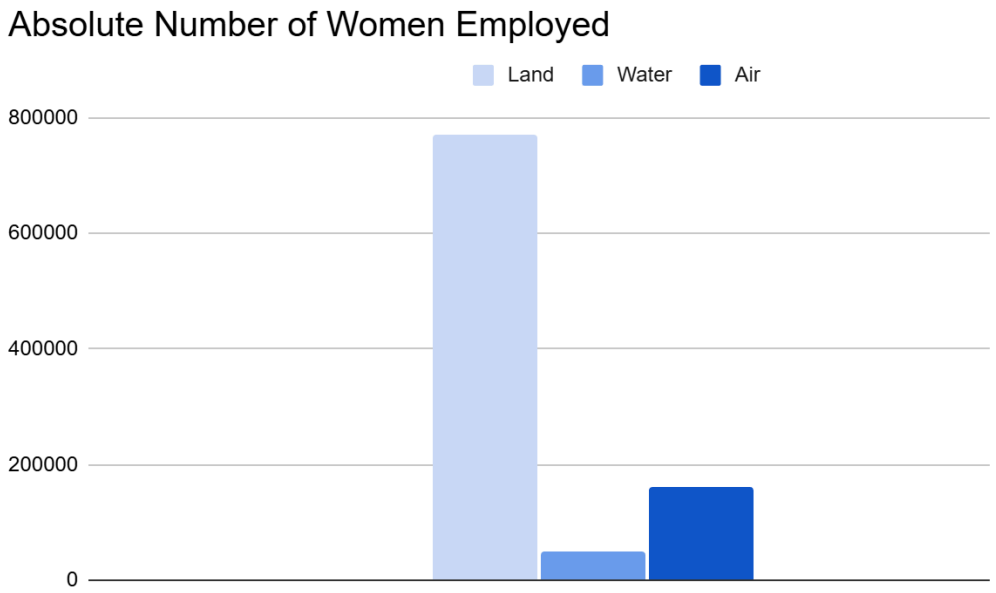


Figure 26: Eurostat 2022 : Number of women work in each sector in 2020 in the EU-27

According to the European Commission, **women make up around 22% of all transport workers in the EU**[33]. However, this average hides large differences between subsectors. **Land transport** employs the highest number of women in absolute terms (over 770,000 in 2020) yet women account for only 14.6% of its workforce, **making it the most male-dominated subsector.**

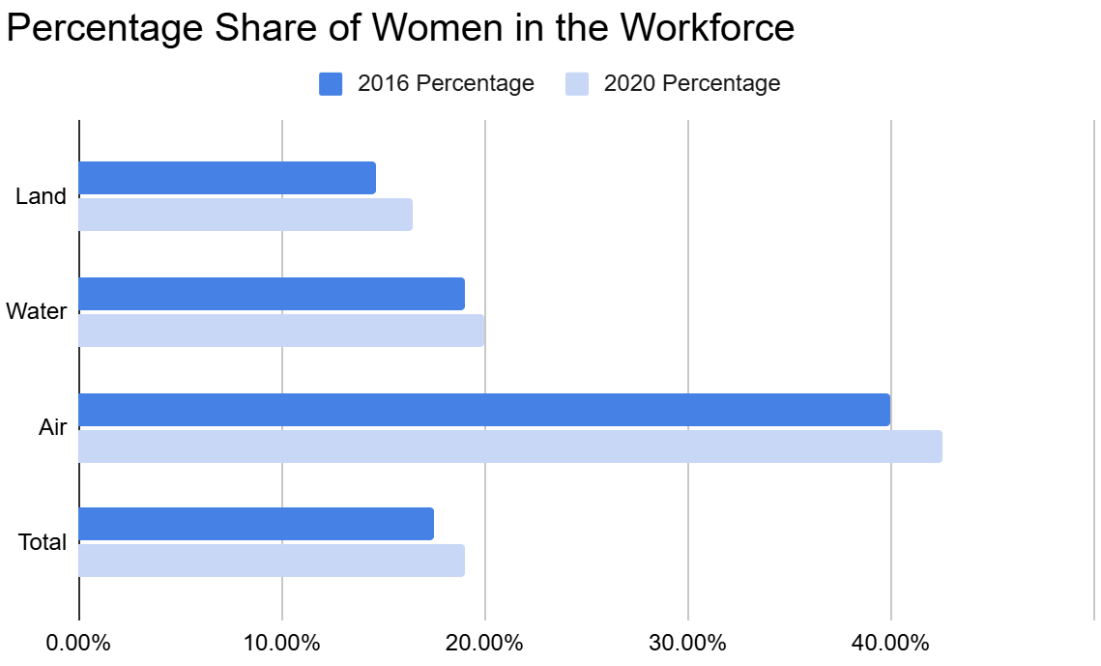


Figure 27: Eurostat 2022 : Percentage Share of Women in the Workforce in the EU-27

[33] European Commission - Mobility and Transport - Equality - Women in Transport

Water transport shows a somewhat more balanced picture with around 20% women, while air transport is by far the most gender-inclusive subsector, with women representing more than 42% of its workforce. Across all three subsectors combined, women still make up less than one-fifth of the transport workforce, despite a gradual increase between 2016 and 2020.

Globally, gender gaps are even wider. Women represent only 10% of the road transport workforce worldwide, and the share of women in professional driving remains extremely low[34]. In most regions, fewer than 3% of truck drivers are women. Belgium clearly illustrates this trend : more than 98% of truck drivers are men[35]. Over the last fifteen years, the percentage of women drivers has risen only marginally (from 1.29% in 2007 to 1.66% in 2021) despite the modernisation of the fleet and an improvement of overall working conditions suitable to drivers of any gender[36].

The cycle logistics sector reflects many of these broader patterns. A comparison between the results of the 2023 and 2024 surveys shows that gender diversity remains limited, with only minor changes from one year to the next. **The share of businesses with very low levels of non-male staff even increased slightly in 2024,** and no organisation reported a majority non-male workforce. Differences between Cycle Logistics Carriers and Mixed Carriers continue to exist, but both groups show a high concentration of companies employing few non-male workers. Overall, progress in the sector remains uneven, mirroring the persistent imbalance seen across the wider transport industry.

Attrition Rate

The attrition rate **measures the percentage of employees who leave an organisation over a given period, whether through resignation, retirement, or other forms of turnover**. A high attrition rate can indicate workforce instability, while a low rate suggests better employee retention and satisfaction.

Overall, **the attrition rate in the transport and logistics sector shows a modest upward trend between 2023 and 2024**. While a significant share of the workforce remains stable, the proportion of employees leaving their positions has increased modestly across the higher attrition brackets.This increase is partly linked to the large-scale recruitment drive following the COVID-19 pandemic, when the sector expanded operations in anticipation of sustained demand. However, current market conditions have not fully matched those expectations, prompting organisations to reassess staffing levels and contributing to challenges in retaining employees hired during that period.

[34] IRU - World Road Transport Organisation - International Women's Day spotlight
[35] Communiqué de Presse - FEBETRA - May 2022
[36] Ibid.

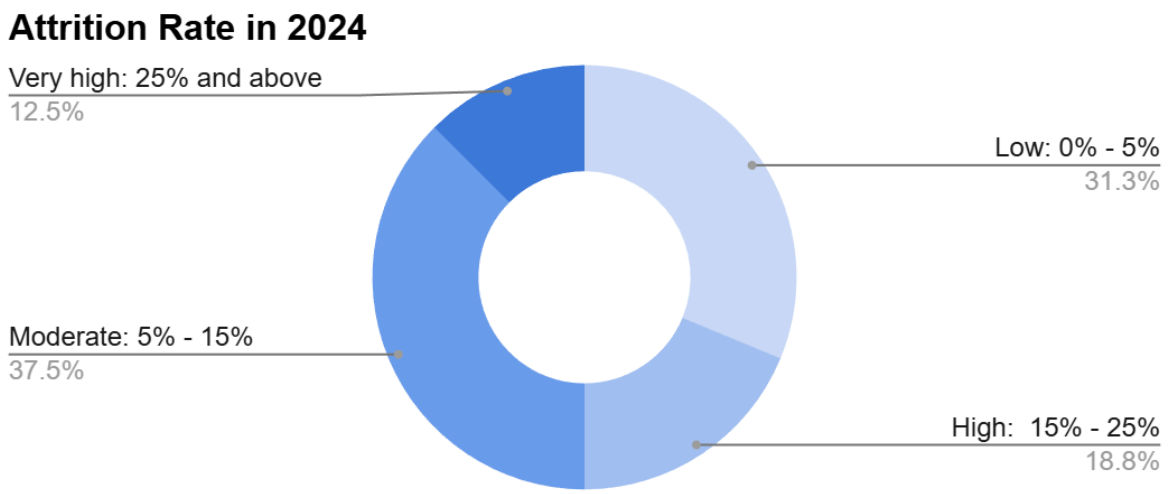


Figure 28: Attrition Rate in 2024

In 2024, the Cycle Logistics industry continued to report generally low to moderate employee turnover, though patterns became more uneven compared to 2023. **Nearly one-third of companies maintained very low attrition (around 0%–5%)**, yet a growing share experienced higher turnover, with some 12.5% reporting rates of 15%–25% or more. This shift suggests that **workforce stability, while still present in part of the sector, is becoming increasingly inconsistent across the sector.**

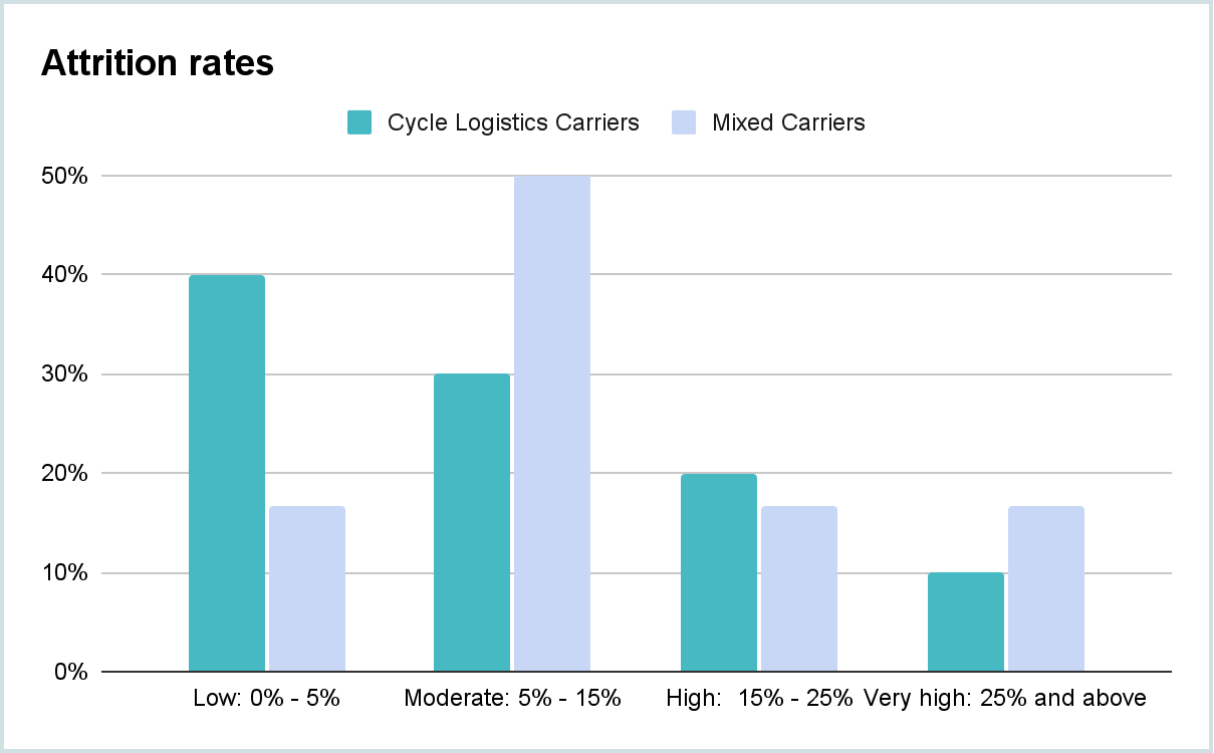


Figure 29: Nouveau titre : Attrition Rates Comparison between Cycle Logistics Carriers and Mixed Carriers in 2024.

Among Cycle Logistics Carriers, staff retention challenges have intensified: the share of organisations with low attrition dropped from 58% to 40%, while those with high or very high turnover rose significantly from **8% to 30%**.

In contrast, **Mixed Carriers appear to have achieved greater stability compared to the previous year.** Their proportion of organisations with low and moderate attrition increased from 50% to 67%, and the proportion of organisations facing high and very high attrition rates decreased dramatically (from 50% to 33%). Specifically, the share with very high attrition has declined from 25% to 17%, and the share with high attrition also saw a major drop from 50% to 17%.

Overall, these results point to a rebalancing of workforce dynamics. Cycle Logistics Carriers are under growing pressure, with retention weakening across the sector, while Mixed Carriers appear to have achieved greater stability compared with the previous year.

Fleet

According to the 2024 survey, **the Cycle Logistics sector operates a total of 5,240 bikes,** a figure that has remained largely stable compared to the previous year (5,245 in 2023).

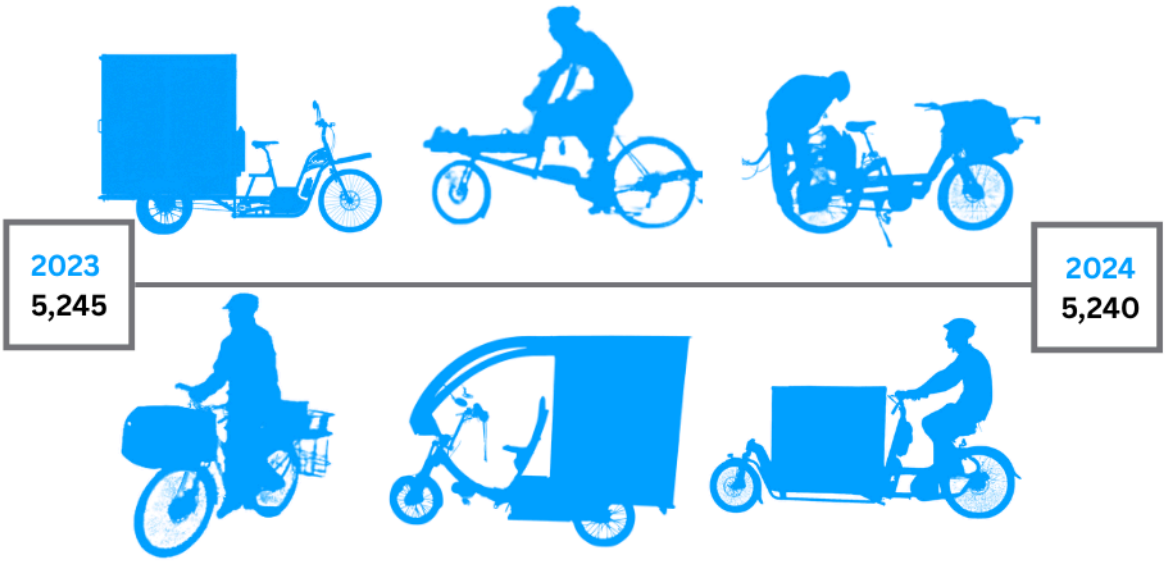


Figure 30: Amount of Cargo Cycle used in 2023 and 2024.

While overall stability characterises the sector, a closer look reveals some contrasting trends: **the number of bikes used by cycle logistics operators has decreased by around 10%, whereas Mixed Carriers have maintained stable fleet sizes. Mixed carriers now represent approximately 98% of the total fleet,** reflecting the dominant role of large-scale national operators in the market.

The slight decline observed among cycle logistics operators can be attributed to several factors. Operators have reported a reduction in operational activity, often linked to rising costs, new operational modes and logistical constraints. In addition, bike theft and maintenance challenges continue to affect fleet availability.

Types of Bikes and Use

In Belgium, the types of bikes used by logistics professionals remain diverse, reflecting different operational priorities. **The majority continue to rely on conventional bikes and electric single-track cargo bikes**, prized for their flexibility and manoeuvrability in dense urban areas. Cargo trailers also remain popular, providing additional versatility for transporting a range of goods.

Mixed carriers, in particular, continue to prioritise larger, high-capacity cargo bikes, often capable of carrying up to 750 kg or 3 m³ of goods. These models are typically employed for parcel distribution and are increasingly adapted to urban conditions. Features such as weather protection, branded exteriors, and reinforced frames for navigating make them well-suited for navigating the cobblestones of Belgian streets.

Maintenance

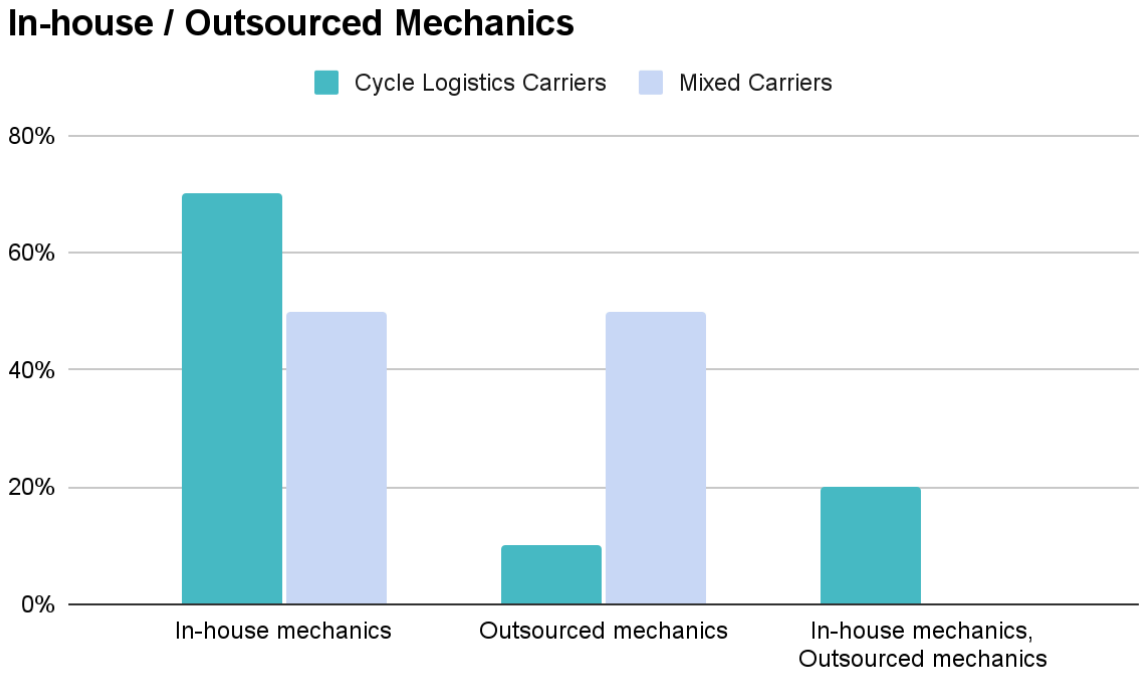


Figure 31: Mechanics in-house and outsourced in 2024.

The data shows how Cycle Logistics Carriers and Mixed Carriers organise the maintenance of their fleets, distinguishing between in-house mechanics, outsourced mechanics, or a mix of both.

In 2024, **Cycle Logistics Carriers continued to rely predominantly on in-house maintenance, with 70% using their own mechanics** from 58% in 2023. Only 10% now fully outsource their maintenance (down from 17%), while 20% combine in-house and outsourced solutions (slightly down from 25%).This steady reliance on internal maintenance teams highlights a strong emphasis on operational autonomy, rapid turnaround, and consistent quality in fleet management.

By contrast, Mixed Carriers show a stable pattern: as **in 2023, 50% depend solely on in-house mechanics, while the other 50% outsource their maintenance entirely.** None reported using a mix of both approaches.

This divergence may reflect differences in fleet composition, maintenance needs and strategic priorities. Mixed Carriers, for whom bikes are not the core business, often outsource maintenance, particularly for heavier or custom cargo cycles with specialised components that require external technicians. Cycle Logistics Carriers, meanwhile, mostly operate standardised cargo bikes, making in-house servicing and maintenance both practical and cost-effective .

Across both carrier types, regular maintenance remains central to fleet reliability and safety, ensuring that vehicles remain fit for daily operations.

Road safety

The 2024 results confirm that **cycle logistics remains a very safe sector**, with the vast majority of operators reporting **no serious accidents**. **63% of respondents experienced no major incidents**, and 38% reported no minor incidents at all. Only a small fraction recorded multiple minor or critical accidents, with incidents occurring more than 15 times being exceptionally rare (13%). These findings underline the sector's strong safety record and the effectiveness of current operational practices in protecting both riders and the public.

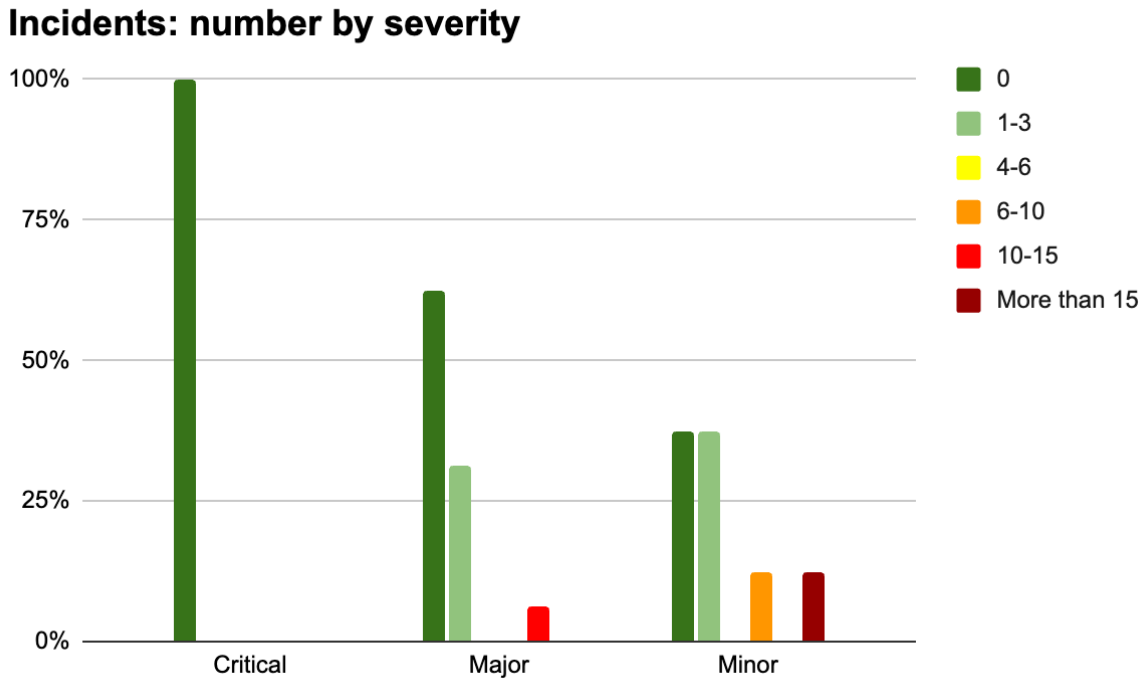


Figure 32: Incidents in 2024, classified by severity.

In 2024, Cycle Logistics Carriers maintained their excellent safety record, with no critical incident reported, consistent with 2023. The share of operators reporting no major incidents stands at 80% percent, a slight decrease from 83% last year, while 20% experienced between one and three such incidents.

Regarding minor incidents, 40% of respondents reported none (down from 50% in 2023), while 50% recorded between one and three incidents. A small proportion (10%) reported between six and ten minor incidents.These figures point to a modest rise in the number of operators reporting minor or major incidents, though no fatal accidents occurred. Overall the sector continues to demonstrate a high level of safety, even as fleet activity and exposure increase.

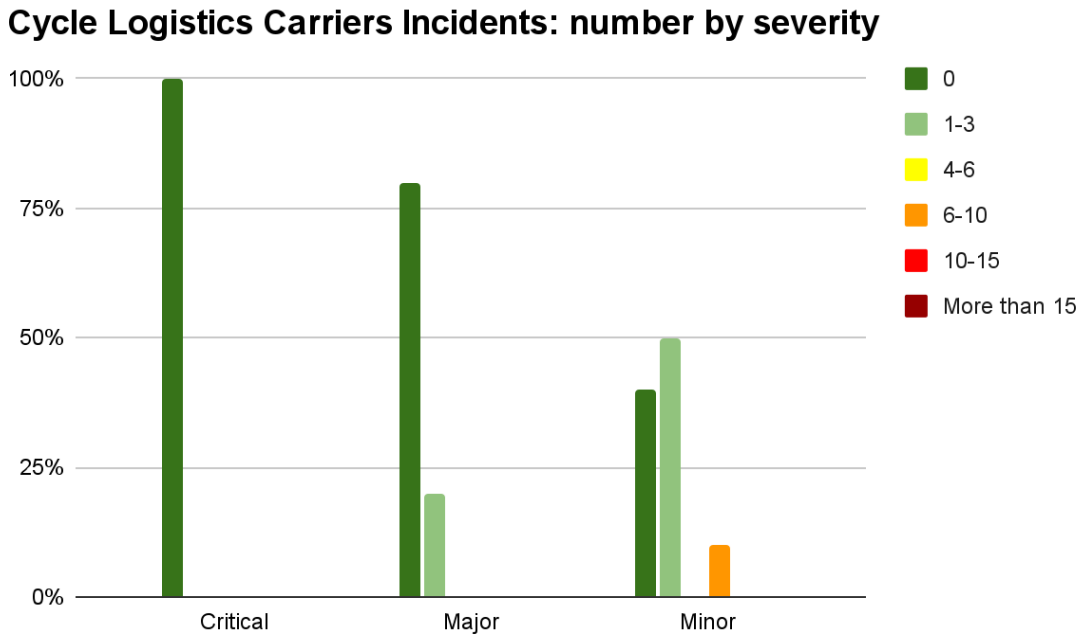


Figure 33: Incidents reported by Cycle Logistics Carriers in 2024, classified by severity.

For Mixed Carriers, the safety record remains positive. No operator reported a critical incident. **One third of operators also reported no major incidents (down from 67% percent last year),** while half of them experienced between one and three, and 17% recorded between ten and fifteen. Regarding minor incidents, one third reported none, an improvement compared to 17% in 2023, though smaller shares of operators reported incidents in other frequency bands.

Both Cycle Logistics Carriers and Mixed Carriers have now reported a second consecutive year with no fatal accidents. While there has been a slight increase of incidents, particularly among Cycle Logistics Carriers, the sector overall continues to demonstrate a **high level of safety performance**, even as operational activity expands

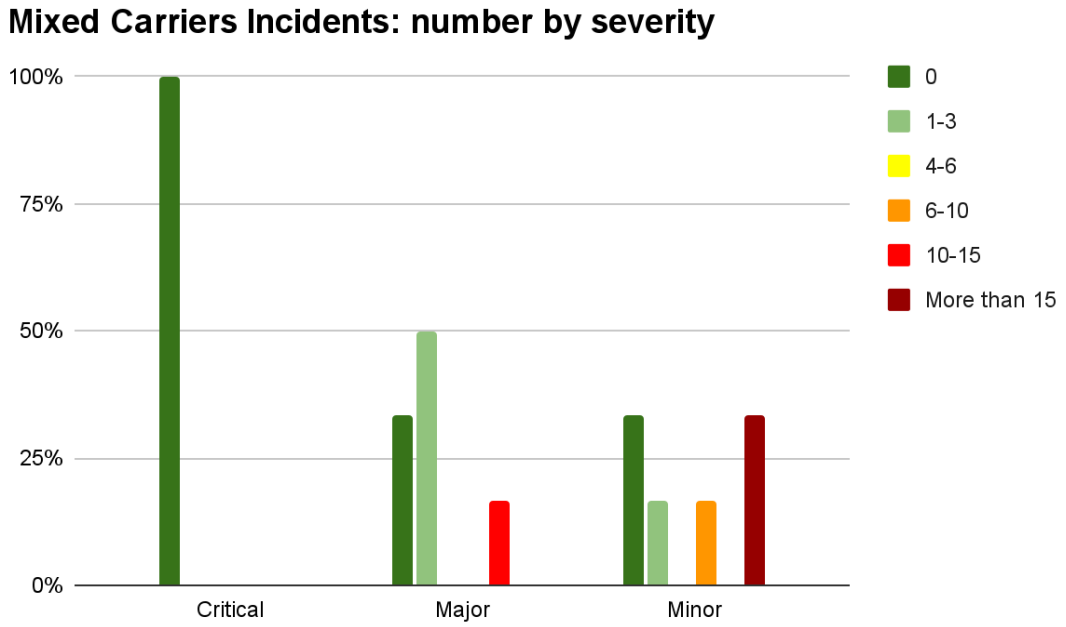


Figure 34: Incidents reported by Mixed Carriers in 2024, classified by severity.

When incidents are assessed against distance travelled, the sector reports an exceptional safety record. Across more than 10 millions kilometers ridden on carrier cycles, no critical incidents were recorded. The number of major and minor incidents are very low, as we estimate only 0.3 major incidents and 1.3 minor incidents per 100,000 km[37]. This performance underscores the sector's strong safety culture. Continued investment in rider training, vehicle maintenance, and safe route planning will be essential to sustaining and further strengthening the high safety standards that characterise the cycle logistics sector.

Environmental & Societal Impact

Urban logistics continues to generate negative externalities such as pollutant emissions, congestion, accidents, noise and wider societal costs. In this context, cycle logistics plays an important role in helping to reduce these impacts.

- **Emission reductions through modal shift**: Shifting a share of deliveries to cargo bikes substantially lowers carbon dioxide emissions. A **10 km journey on an electric cargo bike produces 20 times fewer emissions than an electric light commercial vehicle (LCV)**, and **40 times fewer than a non-electric LCV**[38].
- **Efficiency of shorter routes**: Distances travelled by bike are typically shorter for the same destinations, further amplifying emission savings.
- **Quantified impact**: In 2024, cycle logistics is estimated to have saved **4,112 tons of CO_2 equivalent**, compared to a scenario where **90% of deliveries were made by non-electric LCVs and 10% by electric LCVs**[39].

[37] High-level estimation, as we did not collect the absolute number of incidents
[38] Kale ai. Data-driven Evaluation of Cargo Bike Delivery Performance in Brussels (2023).
[39] ibid.

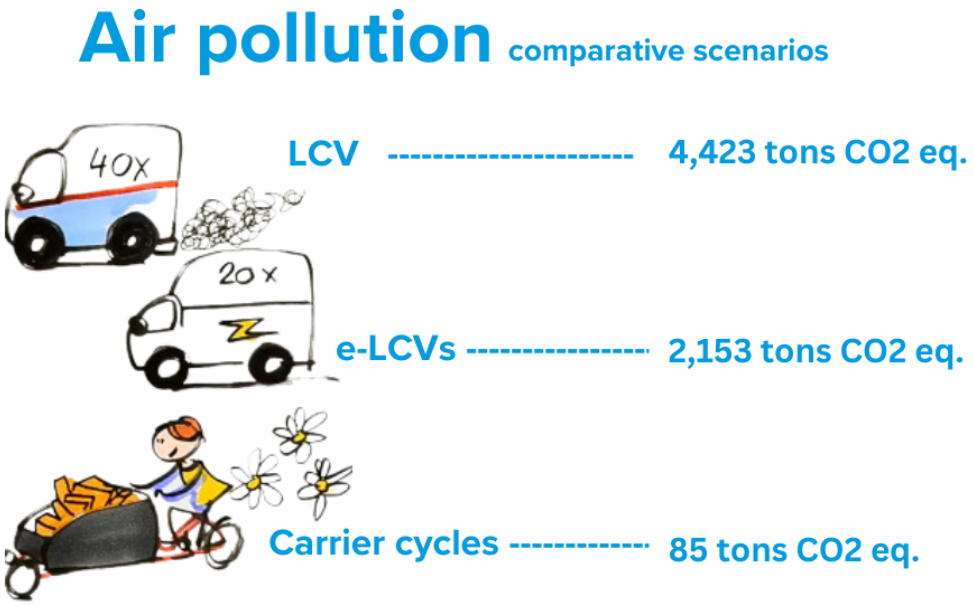


Figure 35: Emissions of CO2 eq. per vehicle type (2024)[40]

In addition to mitigating air pollution, the use of **cycle logistics also helps to reduce congestion and its associated societal costs**. By lowering the number of large vehicles on the road cycle logistics help ease traffic pressures. In 2024, **5.000 cargo bikes in Belgium collectively covered a total of 10.693.143 km**. While this figure represents only a small fraction of Belgium's total vehicle fleet, it nonetheless reduces congestion-causing behaviours such as frequent stops, manoeuvres, and double parking. Applying external cost estimates of congestion per vehicle, **the modal shift to cycle logistics is estimated to generate savings of approximately €12 million in 2024**[41]. For comparison, the same methodology estimated that cycle logistics generated savings of between €9,2 and €10,6 million in 2023.

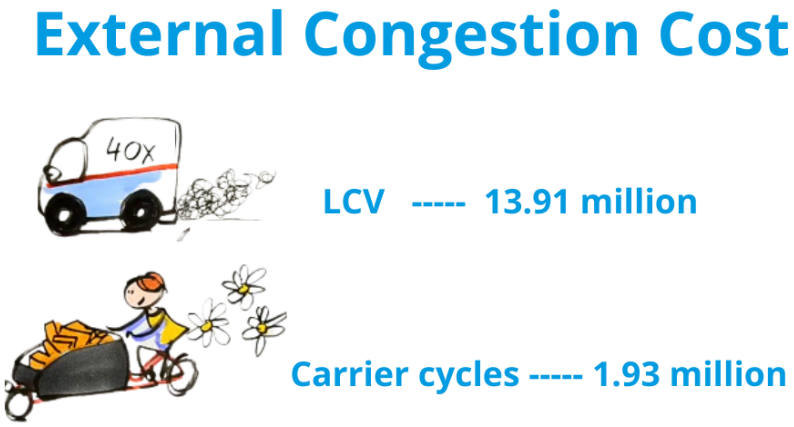


Figure 36: External congestion cost (2024)

If we consider **the total external costs**, including climate change cost, air and sound pollution costs, production costs as well as the costs of accidents and congestion, **the**

[40] Ibid.
[41] Based on figures from VUB MOBI, Mobility, Logistics & Automotive Technology Research Centre (2023).

savings allowed by the cycle logistics sector rose up to €14,7 million in 2024.[42]

€	Congestion	Air pollution	Noise pollution	Accident	Climate change	Production
LCV *(<3,5t)*	13.915.543,03 €	365.545,09 €	12.414,74 €	242.777,12 €	331.059,71 €	85.523,76 €
Cargo bike	1.931.181,63 €	0,00 €	0,00 €	44.911,20 €	0,00 €	17.109,03 €

Table 4: External costs of deliveries per vehicle category[43]

Sector Outlook

Revenues

The revenue outlook for cycle logistics operators shows a shift in expectations compared to last year . In 2023, forecasts for 2024 were cautiously optimistic: 5 percent of respondents anticipated a decline, 33 percent expected no change, 43 percent projected growth of up to 50 percent, and 19 percent foresaw growth of more than 50 percent.

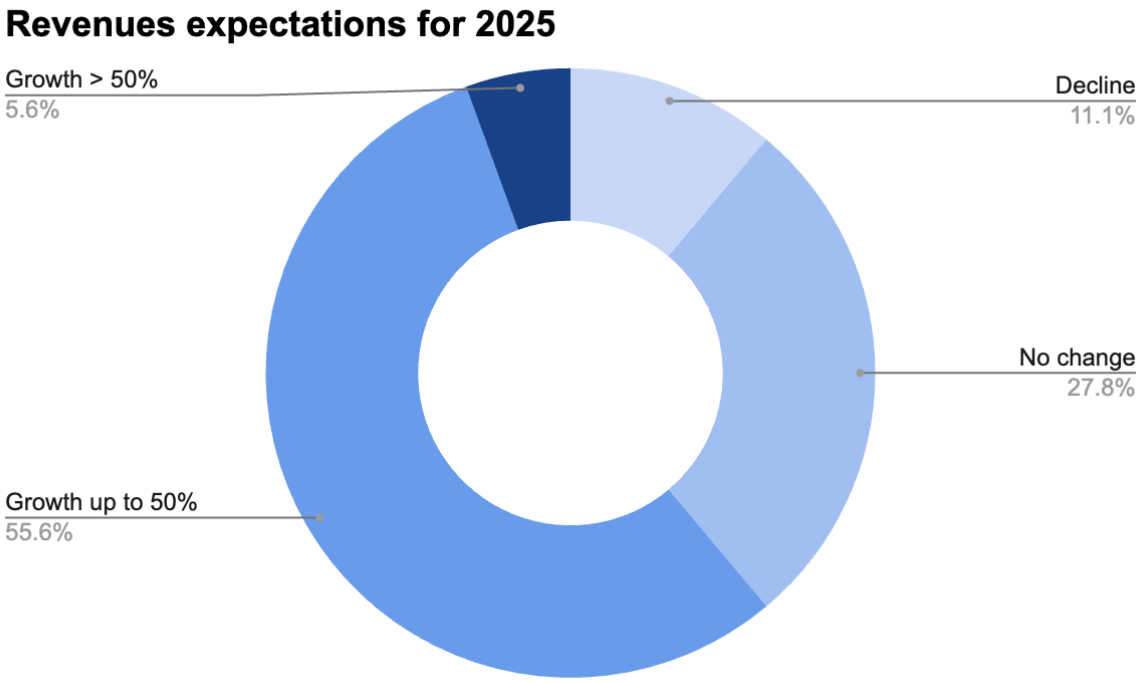


Figure 37: Revenues forecast from 2024 to 2025

The predictions for 2025 point to a more moderate but still positive outlook for cycle logistics operators. The share of operators expecting a decline has risen to 11%, while those anticipating no change have slightly dropped to 28%. Meanwhile, optimism remains strong for moderate growth, with 56% of respondents forecasting revenue increases of up to 50% . However, expectations for very high growth (more than 50%) have fallen sharply to 5.6%.

[42] Based on figures from VUB MOBI, Mobility, Logistics & Automotive Technology Research Centre (2023).
[43] ibid.

Overall, the trend suggests that operators remain generally confident in steady, moderate growth, but are increasingly cautious about extreme expansion. The sector appears to be entering a phase of consolidation and stabilisation, and most operators foresee steady, moderate growth rather than big increases.

Employment

Looking at the employment outlook for 2025, the cycle logistics sector shows a more cautious stance compared to the optimism seen last year.

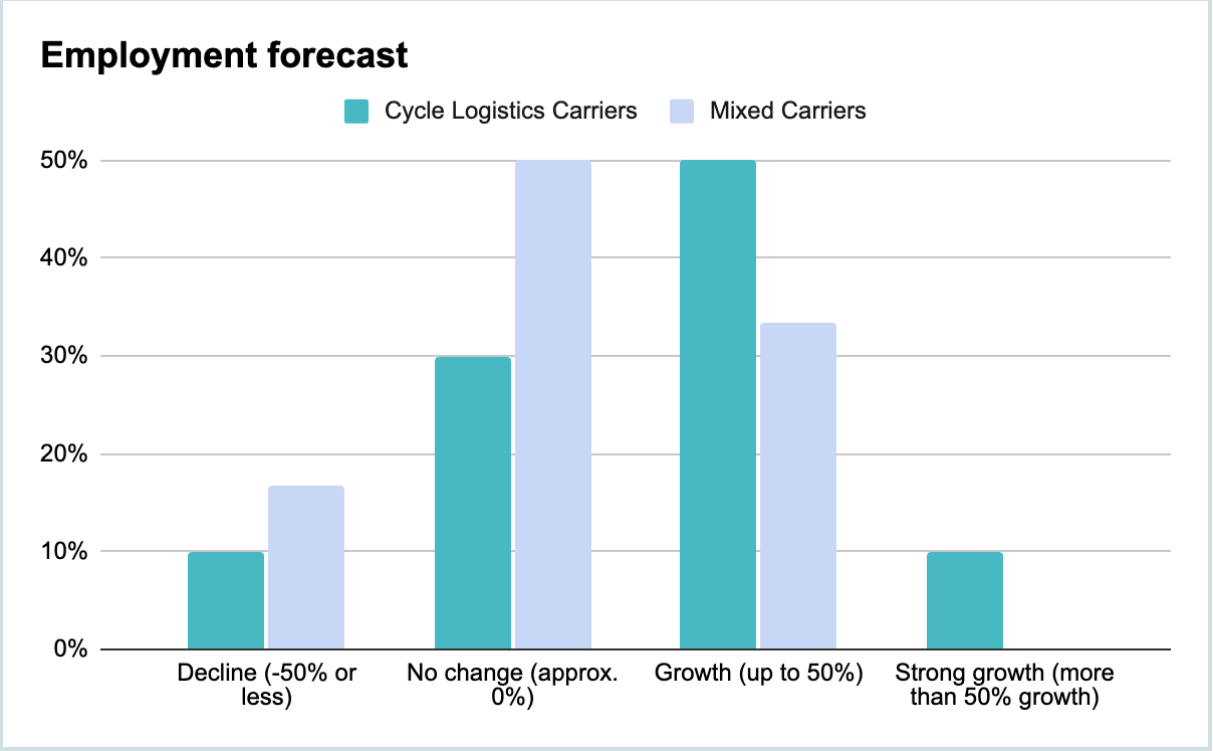


Figure 38: Workforce forecast from 2024 to 2025.

In 2025, half of cycle logistics companies expect moderate growth (up to 50%), while 10% anticipate strong growth. About 30% foresee no change in staff, and 10% predict a decline. Compared to last year, optimism is slightly tempered, with more companies expecting stability.

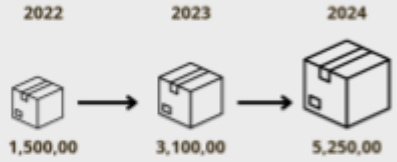
Mixed carriers are more cautious: 50% expect no change, a third project moderate growth, and 17% foresee a decline, with none expecting strong growth.

Overall, the sector still anticipates workforce growth, but 2025 shows a **stabilizing phase.** Key factors include adaptation to EU CO_2-free transport regulations, competitive pressures, and strategic planning needs. If fully leveraged, the sector could continue creating jobs and supporting greener, more efficient urban logistics in Belgium.

Key Takeaways - Status & Trends of Cycle Logistics

More than 5 million deliveries (2024)

Deliveries rose to 5,245,217 in 2024, a 70% increase from 3,031,537 in 2023.



Regional Perspective (2024)

Brussels led with 57.3% of cycle logistics, followed by Flanders at 36.6% and Wallonia at 6.1%

Kilometres Cycled (2024)

total cycling distance nearly reached 10.7 million km, a 30% increase from 2023.

Workforce Trends (2024)

Belgium's cycle logistics workforce fell for the first time since 2020 but still employs 6,237 people (excluding the platform economy).

Diversity

Gender diversity remains very low, with most organisations having ≤10% non-male staff, below the EU road transport average of 14.6%.

Attrition Rate (2024)

40% of Cycle Logisticians had low attrition, a third faced high turnover, while Mixed Carriers saw high and very high attrition drop to 17% each.

Fleet

In 2024, the cycle logistics sector operated 5,240 bikes, remaining virtually unchanged from 5,245 in 2023.

Road safety

Cycle logistics remained very safe in 2024, with no fatal incidents and only 0.3 major and 1.5 minor incidents per 100,000 km.

Material & Equipment

What is a Carrier Cycle?

Carrier Cycle bikes have existed since the 1880s. Historically they were used for newspaper delivery, postal services, food distribution, and street vending. Their popularity declined with the rise of motor vehicles but is now resurging as urban logistics and shopping patterns change, emphasizing sustainable delivery.

Image 1 : Short history of the cargo bike - ICBF - September 2016 – Mark Kirkels

A carrier cycle is a pedal-powered (often with electric assist) cycle designed to carry goods, persons, or professional equipment, tasks that a standard bicycle cannot handle efficiently. Their main goal is to combine urban mobility, efficiency, maneuverability, and carrying capacity.

As a sustainable alternative to cars and vans, (e-)carrier cycles can improve the environmental performance of urban logistics, particularly for last-mile deliveries.

Carrier Cycles Families

Carrier Cycles families are defined by their frame geometry, wheel configuration, and the placement of the cargo load.

The main families include Long Johns (front loaders) and Longtails/Midtails/Shorttails (rear loaders), which are typically two-wheeled cargo bikes, also called biporteurs. Triporteurs are three-wheeled cargo bikes, usually with a front cargo box, offering more stability and higher load capacity. Quadriporteurs, or four-wheeled cargo cycles, provide even greater carrying

volume and are often used for heavier or bulkier loads. Additional variants such as protected cargo bikes with fully enclosed cargo compartments, and tilting trikes, designed for improved stability and cornering, further expand the category.

The table below summarizes the main cargo bike families, including their wheel configuration, type, cargo position, typical load capacity, and energy consumption:

	Family / Category	Cargo Position / Load Type	Typical Load Capacity	Energy Consumption*
2 wheelers				
	Long John (Front Loader)	Front platform or box	75–125 kg	1.0–1.4 kWh/100 km
	Longtail / Midtail / Shorttail	Extended rear rack or frame	75–200 kg	1.0–1.4 kWh/100 km
3-wheelers				
	Triporteur (Front Cargo Trike)	Front box	100–250 kg	1.0–2.5 kWh/100 km
	Rear-Load Cargo Trike	Rear box	110–250 kg	1.0–2.5 kWh/100 km
	Protected Cargo Trike	Fully enclosed cargo compartment	100–300 kg	2.0–3.5 kWh/100 km
	Tilting Cargo Trike	Front platform/box	75–200 kg	1.0–2.0 kWh/100 km
4-wheelers				
	Electric Cargo Quadricycle	Front or rear box	100–500 kg	2.0–3.5 kWh/100 km

Table 5: Cargo Bike Families: Wheels, Load, and Energy Use

Cargo Trailers (Manual & Electric-Assist)

A cargo trailer is a load carrier that attaches to a standard or electric (cargo) cycle, allowing goods to be transported without modifying the main bike. Trailers can be non-motorized or electrically assisted. Electric-assist models have their own motor and battery to help offset the weight of the cargo.

Cargo trailers come in various configurations, including two-, three-, or four-wheeled designs. They range from simple flatbeds to fully enclosed cargo boxes, offering flexibility depending on the type and volume of goods being transported.The main types of cargo

trailers used in urban logistics, along with their features and typical load capacities, are summarized in the table below:

	Trailer Type	Wheels	Load Capacity	Volume	Energy Consumption *
		2	60–150 kg	0.2–1.0 m³	None
	Electric-assist trailer	2–3	100–300 kg	0.3–2.1 m³	0.5–1.0 kWh/100 km
	Container/pallet trailer	2–3	150–300 kg	0.5–2.1 m³	0.5–1.0 kWh/100 km

Table 6: Types of Cargo Trailers (Manual and Electric-Assist)

To provide a clearer framework, the German Association of Cycle Logistics (Radlogistik Verband Deutschland – RLVD) classifies cargo bikes into four main types based on their characteristics and recommended usage:

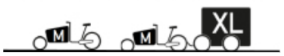
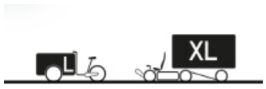
	Type	Characteristics	Recommended Use
	Conventional bikes / light e-bikes	Single-track, often without auxiliary motor	Mail, light express transport
	Light cargo bikes	Single-track, payload up to 350 kg, easy to maneuver	Food delivery, pharmaceuticals, flowers, courier services
	Heavy cargo bikes	Multi-track, with auxiliary motor, payload up to 500 kg, volume up to 3 EPAL pallets	Parcels, general freight, laundry, food logistics
	Cargo trailers	Require a towing bike, with or without auxiliary motor, variable sizes	Combined deliveries, CEP (Courier, Express, Parcel), general goods, food crates

Table 7: 4 Main Categories - code of Conduct Radlogistik Verband Deutschland

Diaporama Cycle Logistics in Belgium

Conclusions from the Cargo Bike Workshop

The Cargo Bike Workshop, organized with the support of Logistics in Wallonia and Public Service of Wallonia (SPW), provided a unique opportunity to explore the practical realities, challenges, and opportunities related to the material used by cycle logistics in urban contexts.

The survey feedback and discussions made it clear that cargo bikes are no longer experimental or niche solutions. On the contrary, they are actively shaping the future of last-mile logistics. However, the workshop also revealed that **cargo bikes currently operate under extreme duress.** Daily stop-and-go traffic, heavy payloads, and six- to seven-day operational schedules place extreme stress on components originally designed for leisure or family use.

As a result, **motors, brakes, batteries, wheels, and transmissions experience wear far more rapidly than most operators anticipate**, underscoring the urgent need for a **paradigm shift in both equipment design and operational strategy**.

For Cycle Logistics Operators

The implications for logistics operators are clear: **cargo bikes demand a professional approach to maintenance and fleet management**. **High-performance electric motors, durable brakes, reliable batteries, and reinforced wheels** are no longer optional but they are essential. Operators must either invest in in-house mechanical expertise or establish strong partnerships with skilled workshops, set aside budgets for frequent part replacements, and actively share their experiences to identify the most robust and cost-effective components. **Focusing on the total cost of ownership (TCO) rather than upfront costs** ensures that heavier investment in durable parts and trailers translates into lower long-term expenses, reduced downtime, and more reliable service. While **trailers** add more flexibility and even more capacity, they are particularly **vulnerable and require reinforced structures and careful corrosion management** to survive the rigors of heavy use.

For Cargo Bikes Manufacturers and Supplier

The workshop also highlighted a substantial design gap in current cargo bike technology. **Many components are still adapted from consumer-grade e-bikes. They are often insufficient for the demands of professional logistics.** To meet operational realities, the sector requires industrial-grade motors, modular and repairable systems, standardized components, durable batteries with safer chemistries, reinforced brakes, load-bearing wheels and tires, and heavy-duty accessories. Manufacturers are encouraged to **provide warranties that reflect professional usage and to support standardization of key components,** including motors, batteries, and trailers, to simplify maintenance and reduce operational risk. By doing so, they can enable logistics operators to adopt cargo bikes at scale with confidence in reliability, safety, and long-term performance.

For the Cycle Logistics Sector

At the sector and policy level, the workshop emphasized the need for a **systemic approach to professionalizing cargo bikes**. The current reliance on “upgraded” e-bikes, is often insufficient for the demands of commercial urban logistics. To address this, n**orms and certifications** tailored to professional cargo bikes, such as EN standards and ISO guidelines, should be widely adopted. pen, independent, **knowledge sharing platforms**, accessible to operators, mechanics, and manufacturers, can accelerate learning, disseminate best practices, and guide the development of more durable and modular equipment. **Innovation should prioritize robust carrier cycles designed for intensive use, corrosion-resistant materials for long-term durability, easily repairable motors to reduce downtime,** and a diverse range of bike and trailer formats to meet the evolving needs of urban logistics. By embedding these priorities into both sector practice and policy frameworks, cargo bikes can be scaled with confidence as a cornerstone of sustainable urban logistics.

Finally, the workshop reinforced a clear vision for the future of urban transport in which cargo bikes are a reliable and sustainable backbone of city logistics. By tackling both technological and operational challenges, the sector can achieve lower maintenance costs, greater reliability, and enhanced competitiveness compared with traditional delivery methods. **Policy support** in the form of incentives, procurement guidelines, and targeted R&D funding will be critical to accelerating these transformations, creating a virtuous cycle of innovation and adoption. Systematically, **monitoring the total cost of ownership** will provide valuable evidence of the economic and environmental benefits of investing in professional-grade cargo bikes, further solidifying their role in sustainable urban mobility.

In conclusion, the workshop showed that cargo bikes are **no longer a marginal** mode of transport. They are driving **a structural shift toward greener, more efficient, and people-friendly city logistics. With robust equipment, professional practices, innovation, and knowledge sharing,** the cargo bike sector can transform the promise of cycle logistics into a lasting and scalable solution for Europe’s cities.

Key Takeaways - Cargo Bike Workshop

Cycle Logistics Operators

Cargo bikes face heavy daily stress & components wear faster than expected.

Professional maintenance, invest in durable parts, monitc total cost of ownership, reinforce trailers, develop mechanical expertise or partnerships.

Manufacturers & Suppliers

Consumer-grade components are insufficient & a design gap exists.

Industrial-grade motors, standardized & repairable system durable batteries, reinforced brakes/wheels, heavy-duty accessories, warrantie for professional use.

Sector / Policy Makers

Current models and norms don't meet commercial needs & knowledge sharing is limited & Sector & Norms tailored for commercial cargo bikes are being developed

Adopt new norms for commercia cargo bikes and develop tailored standards (EN/ISO), support R&D & innovation, open knowledge-sharing platform encourage diverse bike/trailer designs & Monitor the evolution of TCO.

Legal & Regulatory Overview

Cargo bikes operating in the EU and Belgium must comply with a combination of machinery safety rules, vehicle type-approval legislation, and national traffic regulations. The sections below summarise the key requirements.

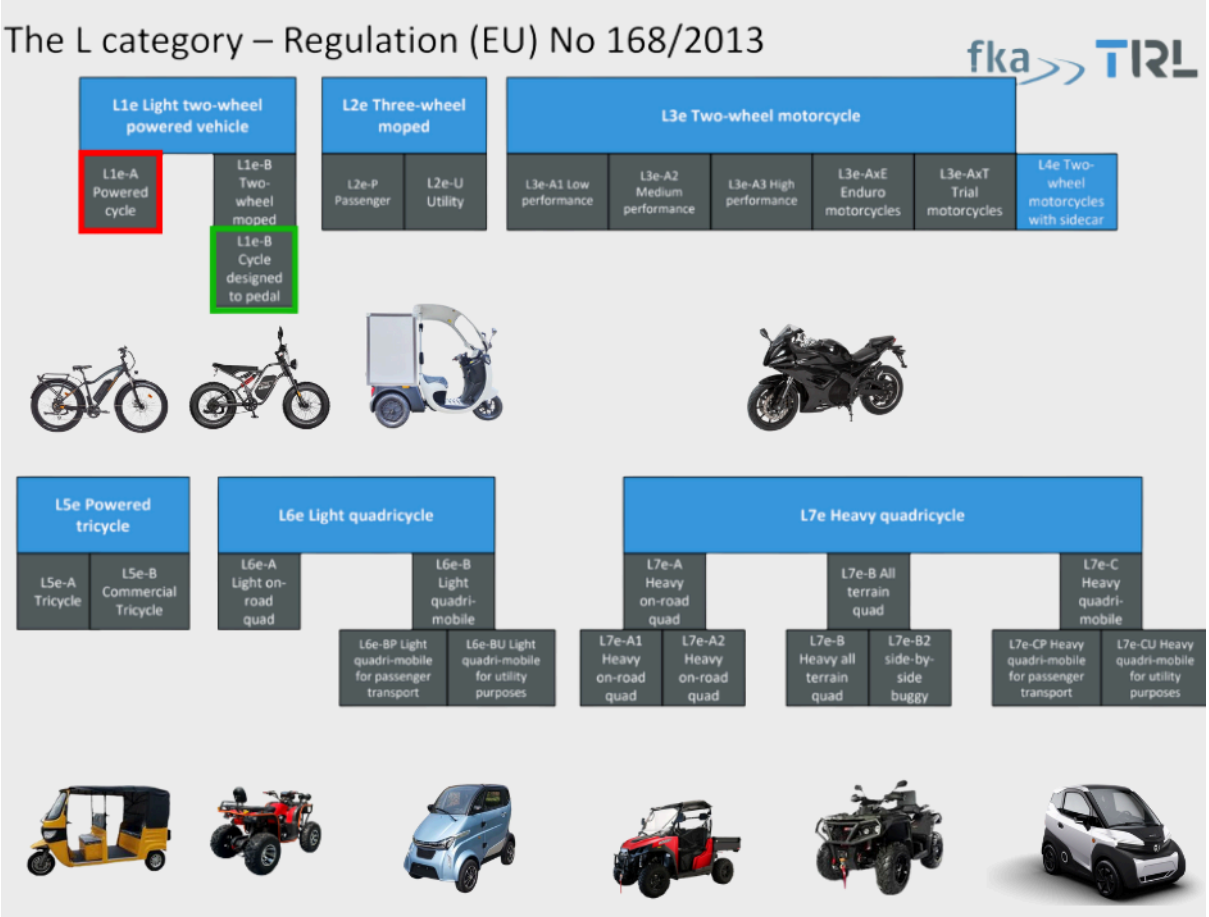
EU Legislation

Cargo bikes, including electrically assisted ones (EPACs), fall within the scope of the **EU Machinery Directive (2006/42/EC)**, which ensures that all vehicles meet essential safety standards and carry the CE marking.

EN 15194 specifically describes EPACs as bikes with a maximum continuous rated power of 0.25 kW, where the motor output is gradually reduced and eventually cuts off at 25 km/h, or sooner if the rider stops pedaling. It defines safety and performance requirements for all EPACs. This standard currently applies to both private and professional use, although it does not specifically address the particular loads and structural demands of cargo bikes.

EN 17860, is being developed specifically for cargo bikes, setting clearer rules for their strength, stability, and safety. This new standard will complement EN 15194 by providing dedicated criteria for load-carrying applications. It introduces categories for single-track cargo bikes (GVW up to 300 kg), multi-track cargo bikes (GVW up to 300 kg), heavy cargo bikes (GVW up to 650 kg), and electric-drive trailers.

Regulation EU 168/2013, is the EU framework regulation for the approval and market surveillance of two- and three-wheel vehicles and quadricycles, commonly referred to as the “L-category vehicles regulation”. It defines vehicle categories (such as mopeds, motorcycles, speed pedelecs, quadricycles), the technical requirements for type approval, the environmental and safety rules, and the obligations for manufacturers. The regulation only applies to powered vehicles that are more powerful than regular bicycles or EPACs, so EPACs that meet the standard limits are not covered by this rule.



Cycles up to 1kW with max 25 km/h:
Helmet, license, insurance & registration

Cycles up to 4kW with max 45 km/h:
Helmet, license, insurance & registration

Figure 39 : European Regulations for 2-3-4 wheels Powered Vehicle

National Legislation

Cycles and EPAC's

In Belgium, the legal framework for cargo bikes is based on a combination of EU machinery Directive, EU Norms for safety standards, European Union vehicle categories and national traffic laws.

The rules that apply depend primarily on the bike's technical characteristics, including propulsion type, maximum motor power, maximum assisted speed, and overall vehicle design. These criteria determine whether a vehicle remains classified as a bicycle/EPAC or enters the EU L-category, triggering additional type-approval requirements.

Under Belgian traffic law, a cargo bike, maximum width 1 m, with pedals and, if applicable, an auxiliary electric motor with a maximum continuous rated power of 250 watts, which provides assistance only up to 25 km/h, is considered a bicycle, also known as an EPAC (Electrically Power Assisted Cycle, according to EN 15194). As long as these limits are respected, the vehicle retains bicycle status under Belgian traffic law. This classification exempts it from any requirements for registration, insurance, or a driving licence.

To clarify the practical implications of these classifications, the table below compares EPAC cargo bikes with L-category vehicles such as mopeds and scooters.

	EPAC Cargo Bike 	**L Category** (Moped/Scooter/Motorcycle/...) 
Pedals	✅ Yes	✅ Sometimes (L1e with pedals)
Motor Power	≤ 250 W	> 250 W
Assist Limit	25 km/h	> 25 km/h*
Licence Required	❌	✅
Registration	❌	✅
Insurance	❌	✅
Cargo Limits	None	Regulated

Table 8 : Comparison of EPAC Cargo Bikes and vehicle in the "L category"
**There is an exception for vehicles limited to 25 km/h, classified as L1e-A*

When a cargo bike has higher technical specifications, it may fall into other EU vehicle categories as shown below. The following table summarises the threshold values and the corresponding legal category.

Category	Technical limits	Requirements	EU Classification
Cycle (EPAC)	≤ 250 W motor assist up to 25 km/h	No licence, registration, or insurance	EPAC – EN 15194
Powered Cycle	≤ 1 kW motor assist up to 25 km/h	Insurance, registration, minimum age 16	L1e-A – EU 168/2013
Class A Moped	≤ 4 kW motor max 25 km/h	Licence, helmet, insurance, registration	L1e-B – EU 168/2013
Class B Moped / Speed Pedelec	≤ 4 kW motor max 45 km/h	Licence, helmet, insurance, registration	L1e-B – EU 168/2013

Table 9 : Regulatory Categories for EPACs and Mopeds

Trailers for Cargo Bikes

Belgian law also regulates the use of trailers for cargo transport. While federal rules define the standard limits, all regions conduct pilot projects that allow slightly larger dimensions for urban logistics trials.

Parameter	Standard limits	Pilot projects limits
Max width	1.0 m	1.2 m
Max length (cycle + trailer + load)	2.5 m	2.5 m
Max gross weight	80 kg	>80 kg only if automatic braking system present

Table 10 : Regulatory Categories for Trailers

In summary, the regulatory treatment of cargo bikes in Belgium is primarily determined by motor power, assisted speed, and vehicle design. Most cargo bikes remain classified as EPACs, but higher-capacity or motor-enhanced models may fall under EU L-category vehicle rules.

Regional Legislation

Belgium's three regions (Flanders, Wallonia, and Brussels-Capital) have introduced additional rules to allow cargo bike trailers wider than 1 metre, mainly through pilot projects. These rules focus on safety, operational conditions, and the authorisation process for using wider trailers. The BCLF proposes that such trailers be formally included in the regulatory framework, ensuring broader and safer adoption across all regions.

In Flanders, wider trailers (up to 1.2 metres) in pilot projects must have a braking system and reflective signage. Transporting hazardous materials is prohibited. The maximum permitted speed is 50 km/h, with the choice between using the cycle path or the road. Loading and unloading is allowed in parking areas. The pilot is ongoing until the end 2027[44].

Maximum Authorized Width	Authorization Procedure	Specific Conditions
Over 1 m (max. 1.2 m in pilot project)	Online application for a 2-year authorization for a pilot project	Bicycle with electric assistance max. 25 km/h, 250 W

Table 11 : Regional Rules for Wide Cargo Bike Trailers in Flanders

In Wallonia, wider trailers are limited to cargo bike transport companies participating in pilot projects. Operators must have liability insurance, provide a declaration confirming knowledge of road safety rules, and comply with approved routes. Authorisations are valid for two years and can be renewed once after evaluation. They can be revoked in case of accidents or non-compliance.

Maximum Authorized Width	Authorization Procedure	Specific Conditions
Over 1 m (max. 1.2 m in pilot project)	Application to SPW's Road Safety Regulation and Road Control Department, with documents required by AGW of 16/12/2021[45]	Cargo bike transport companies only

Table 12 : Regional Rules for Wide Cargo Bike Trailers in Wallonia

In Brussels, trailers wider than one metre (up to a maximum of 1.2 metres within pilot projects) were initially subject to prior written authorisation under regional decree, which was annulled by the Council of State. Since then, under the Royal Decree, anyone can now use them without authorisation. These rules are now formally integrated into the Brussels Public Road Code, which enters into force on 1 June 2027.

Operators are required to comply with the relevant provisions of Articles 46 and 82.4.2 of the Belgian Highway Code, which cover general safety rules, proper positioning on the road, and restrictions on obstructing traffic flow.

[44] Goederenvervoer met fietsaanhangwagens: proefproject
[45] Réglementation du code de la route

Maximum Authorized Width	Authorization Procedure	Specific Conditions
Over 1 m (max. 1.2 m in pilot project)	Prior written application to the Minister or delegated official for authorization valid for 2 years, renewable once after evaluation	Limited to companies participating in pilot project

Table 13 : Regional Rules for Wide Cargo Bike Trailers in Brussels

EU Negotiation Status

Currently, the European e-bike industry is engaged in **ongoing discussions to further clarify the definition of electrically power-assisted cycles (EPACs)**. The **German Bicycle Industry Association (ZIV) has proposed a narrower definition**, suggesting **limits on assistance ratios, peak motor power, and maximum vehicle weigh**t to preserve the classification of EPACs as vehicles of active mobility[46]. This proposal aims to ensure that cyclists remain physically involved in propulsion and to distinguish EPACs from motor vehicles subject to type approval[47]. However, other stakeholders, such as LEVA, argue that such restrictions could stifle innovation, reduce accessibility for certain users, and undermine the broader adoption of light electric vehicles in sustainable mobility[48].

These debates highlight the tension between maintaining safety and technical clarity while preserving market flexibility, inclusivity, and the potential for urban logistics innovation. Industry participants, including ourselves, are actively monitoring and contributing to these discussions, aiming to ensure that future regulations will not restrict the use of cargo bikes or hinder the growth of cycle logistics. The outcome will likely further shape the regulatory landscape for EPACs and cargo bikes in the coming years.

In the meantime, the regulatory landscape for cargo bikes in Belgium reflects a careful balance between EU-wide safety standards, national and regional flexibility. While EPACs enjoy simplified rules akin to conventional bicycles, heavier or more powerful vehicles and trailers are subject to stricter requirements, with pilot projects enabling innovation such as wider trailers under controlled conditions. **At the European level, ongoing debates aim to further refine the definition of EPACs and clarify their distinction**. The outcome of these discussions will play a key role in shaping future legislation, ensuring that safety, innovation, and sustainable mobility and logistics continue to evolve hand in hand across Europe.

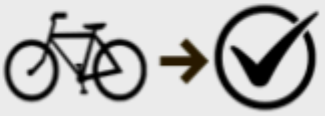
[46] ZIV position:E-bikes – active mobility as success factor - 7 April 2025
[47] ZIV position:E-bikes – active mobility as success factor - 7 April 2025
[48] Open Letter Sent to ZIV: 196 Signatures From 22 Countries - 10 November 2025

EU Legislation – Cargo Bikes & EPACs

EU Machinery Directive (2006/42/EC)

Requires that all bikes and machines sold in Europe are safe and meet basic safety standards.

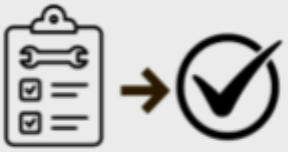
Bikes that pass get the CE mark.



EN 15194 (EPAC Standard)

A safety and performance standard specifically for electrically assisted pedal bikes (EPACs).

Makes sure the motor, brakes, and structure are safe and reliable.



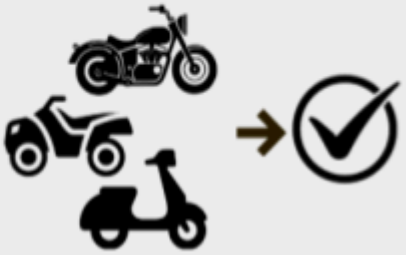
EN 17860 (Cargo Bike Standard, in progress)

A new standard for cargo bikes and trailers.

Sets rules for strength, stability, and safety based on bike size, weight, and type of load.

Regulation EU 168/2013

Regulation EU 168/2013 governs approval, safety, and environmental rules for mopeds, motorcycles, and quadricycles, but excludes standard bicycles and EPACs.



Focus Priorities for the Future of Cycle Logistics

In this edition, BCLF presents a refined set of strategic priorities focused on the most urgent levers identified jointly with our Board and Advisory Board. These reflect new regulatory developments, market pressures, and the need to ensure fair and sustainable growth of the cycle logistics sector in Belgium.

Each recommendation reinforces the following recommendation, generating momentum for a more resilient and competitive sector.

Strategic Priority 1: Adapt Public Tenders to Include Bike Logistics and Reward Quality Employment

Public tenders play a decisive role in shaping the logistics market. Yet, most frameworks remain designed around motorized vehicles, making it difficult for cargo bike operators to compete on fair terms. To address this, **public tenders should explicitly recognise cycle logistics as a valid operational mode**, with dedicated scoring for environmental performance, urban efficiency, and reduced road-space impact.

Contracts could be divided into separate lots, enabling cycle based solutions to participate in urban or specialized segments even if other parts of the contract are less suited to cargo bikes. This approach allows tendering authorities to support sustainable mobility without excluding innovative solutions simply because they cannot cover the entire service scope.

To promote a sustainable and professional sector, **tenders should also value qualitative employment,** favouring providers offering stable contracts, fair wages, and professional training. Public money must not incentivise low-cost models based on precarious labour. Instead, procurement should drive a **professional, resilient, and socially responsible cycle logistics sector**.

Strategic Priority 2: Include Cargo Bikes in Corporate Fleet Greening Policies

As companies transition to cleaner fleets, **cargo bikes must be recognised as equally essential vehicles, for professional and operational purposes alongside** electric motorised fleets. They deliver unmatched efficiency in dense urban areas, dramatically reduce emissions, and improve service reliability. **Fleet-greening schemes** (subsidies, fiscal incentives, and reporting obligations) **should explicitly include cargo bikes as eligible assets**, encouraging businesses to shift deliveries, service trips, and internal logistics to bike-based alternatives whenever possible.

By treating cargo bikes as mainstream fleet vehicles, Europe and Belgium can accelerate emissions reduction, strengthen compliance with climate goals, and promote **innovative logistics models** that make cities cleaner, quieter, and more efficient.

Strategic Priority 3: Ensure Regulatory Common Sense: Postal Law and Market Oversight

The Belgian Postal Law has the potential to support fair and good working conditions and curb unreasonably low-price practices in the logistics market. However, its implementation must be adapted to the specific realities of cycle logistics. **We recommend:**

- **Proportionate obligations to avoid unnecessary administrative burdens for small or responsible operators.**

- **Strong enforcement where labour abuses or unfair practices occur, ensuring that regulation protects workers and maintains fair competition.** Regulatory stability, clarity, and proportionality to ensure that the postal law supports the development of sustainable last-mile solutions.

Strategic Priority 4: Guarantee Easy Access for Cargo Bikes in Access Regulations and Low-Emission Zones

Cargo bikes have extremely low environmental impact and drastically reduce congestion, yet they are sometimes restricted by rules designed for motor vehicles. **Belgium should ensure practical and harmonised access to pedestrian zones for cargo bikes.** Where time-based restrictions are applied, these should be less strict than for trucks or vans, recognising the unique efficiency and sustainability benefits of cargo bikes.

A consistent, countrywide approach would avoid fragmentation between municipalities and allow operators to plan efficiently, lowering costs and supporting the shift toward zero-emission deliveries.

Strategic Priority 5: Develop Clear and Supportive Legislation for Cargo Bikes

The rapid growth of Cycle logistics requires a clear legal framework that supports innovation and ensures safety. Belgium should adopt harmonised definitions and rules for cargo bikes and trailers, aligned with European standards. **Legislation should ensure that cargo bikes remain part of the EPAC category, provided they continue to meet the current EPAC definition.**

At the same time, regulation must avoid unnecessary constraints that hinder sector flexibility. Less regulatory complexity is better for the sector. A unified approach strengthens safety and clarity while preserving the agility that makes Cycle Logistics effective.

Strategic Priority 6: Address Labour Cost Asymmetries to Ensure Fair Competition

Cycle logistics is inherently labour-intensive, yet the sector competes with “carbon-intense” delivery models that rely on lower labour costs, cross-border arrangements, or

self-employed couriers. This creates significant cost asymmetries that make it harder for socially responsible operators to remain competitive.

We request to level employment conditions in the last mile transport and delivery activities by ensuring that work is carried out under regular employment contracts, so that all actors compete on a level playing field. In addition, we recommend:

- **Targeted reductions in employer social contributions for cycle logistics jobs, to strengthen competitiveness**
- **Strict enforcement against abusive employment practices, ensuring fair treatment of workers and compliance with labour standards**.

Supporting companies that offer formal, stable jobs is essential to ensure both fairness and long-term sector resilience of the cycle logistics sector.

Conclusion

Belgium is at a critical juncture for sustainable logistics. Cargo bike deliveries have already demonstrated their efficiency, environmental benefits and capacity to generate local employment. To fully realise this potential the policy framework must evolve:

- **Public tenders** should explicitly recognise bike logistics.
- **Fleet-greening policies** must include cargo bikes as mainstream assets.
- **Regulations**—from postal law to low-emission zone rules—must be coherent, modern, and tailored to sector realities.
- **Labour-cost imbalances** must be addressed to ensure fair competition.
- **Simplified legislation** for cargo bikes is needed to provide stability and clarity.

By aligning incentives, regulation, and labour standards, Belgium can secure **fair, sustainable growth** in cycle logistics and establish cargo bikes as a cornerstone of **zero-emission urban mobility**.

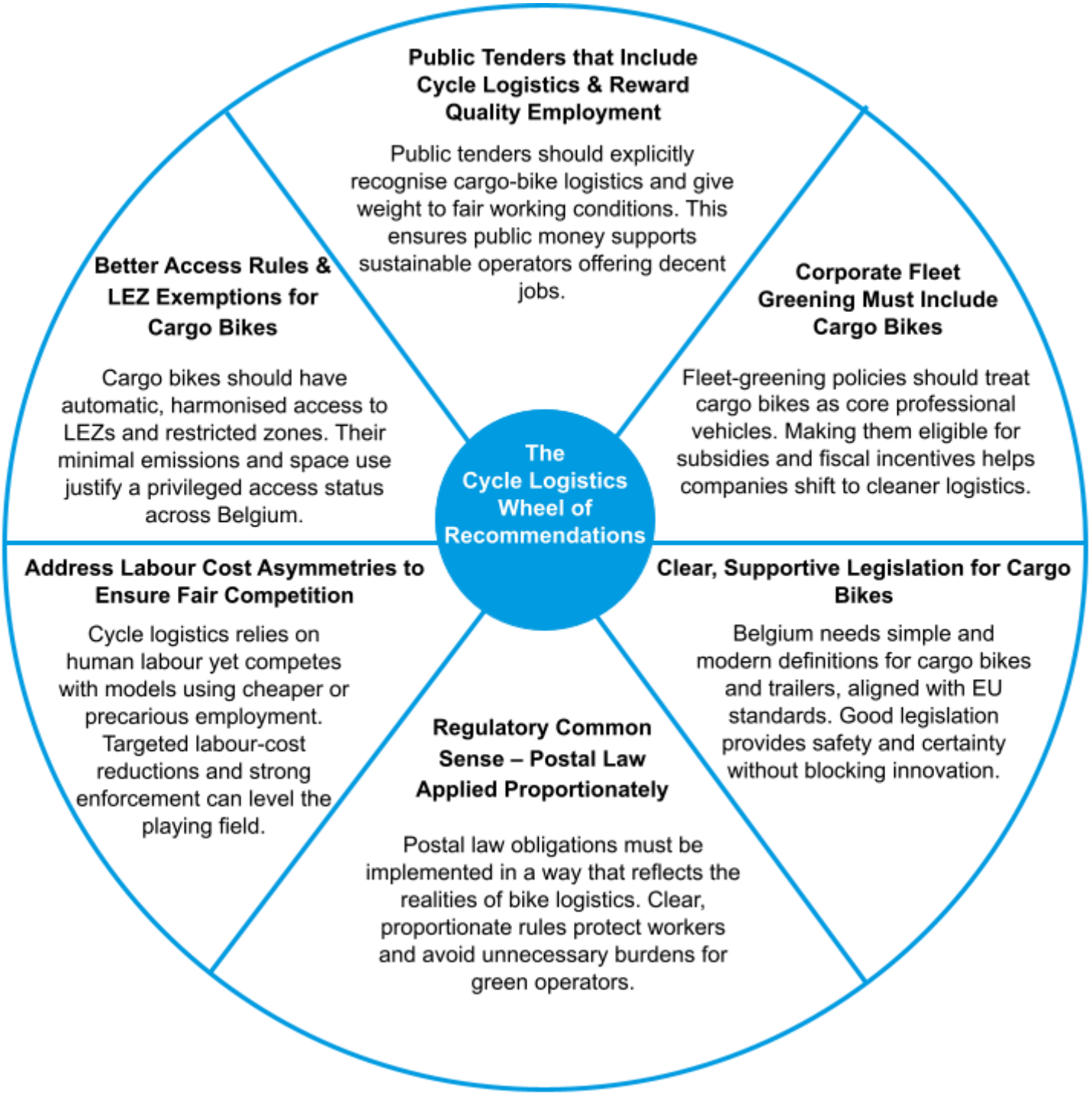


Figure 40 : The Cycle Logistic Wheel of 2024's recommendations

Conclusion

The cycle logistics sector in Belgium has firmly established itself as a vital cornerstone of sustainable urban mobility, proving that last-mile deliveries can be efficient, environmentally responsible, and socially beneficial.

In 2024, more than 5,000 cargo bikes covered over 10 million kilometers, maintaining an impressive safety record and expanding operational expertise. Far from being experimental, cargo bikes have demonstrated their role as practical and robust solutions capable of transforming urban goods movement. The sector's achievements include;

- Significant reductions in CO2 emissions, air and noise pollution, and urban congestion,
- Millions of euros in societal savings through improved health, cleaner air and reduced traffic
- Job creation and local economic benefits, reinforcing the social value of cycle logistics

These achievements highlight that cycle logistics can deliver real, measurable impact for businesses, cities, and communities.

At the same time, the sector faces challenges that will shape its next phase of growth. Workforce dynamics, especially gender diversity and staff retention, remain a priority, with Cycle Logistics Carriers experiencing higher attrition.

On the material side, the wide variety of cargo bikes and trailers underscores the need for professional-grade equipment. Manufacturers are encouraged to adapt to the intensive demands of daily urban deliveries by providing durable, modular, and maintainable designs. In parallel, operators are increasingly investing in reinforced frames, high-performance motors, and systematic upkeep. Together these steps reflect a sector that is learning, innovating, and building resilience to sustain efficient, sustainable, and high-quality urban logistics.

Policy and regulatory frameworks continue to shape the future of the cycle logistics sector, but the design must strike a careful balance between safety, clarity, and operational flexibility. Clear and supportive rules for cargo bikes, EPACs, and trailers, combined with unhindered access to urban spaces and recognition in public tenders and corporate fleet policies, can create opportunities for growth and innovation. At the same time, it is crucial that legislation remains adaptable, allowing operators, particularly mixed carriers with larger, high-capacity cargo bikes, to continue serving urban deliveries efficiently without being burdened by excessive regulations.
Pilot projects in Belgium for large trailers and evolving EU guidelines demonstrate increasing recognition of cargo bikes as essential, high-value assets in city logistics, yet maintaining flexibility in these standards will be key to preserving the sector's diversity of cargo bike types and capacity for innovation. When paired with fair employment practices, strategic workforce planning, and investment in professional-grade equipment, these frameworks provide the sector with the foundation it needs to scale sustainably and strengthen its role in Europe's transition to zero-emission urban mobility.

Looking forward, the cycle logistics sector stands at the threshold of broader societal and economic impact. By continuing to innovate, professionalize operations, and advocate for supportive policies, it can further reduce urban congestion, lower emissions, create meaningful local employment, and enhance the efficiency and resilience of city logistics. The sector's trajectory demonstrates that sustainable, human-centered transport solutions are not only desirable but achievable, and that a future in which urban deliveries are greener, safer, and more efficient is already taking shape.

Belgium's cycle logistics operators are leading this transition, showing that with vision, dedication, and collaboration, the promise of cargo bike deliveries can become a lasting reality, shaping more liveable, sustainable cities for years to come.