

The economic impact of sustainable mobility

An analysis of the sustainable mobility industry's impact on Germany's economy, April 2024

117.6 bn. €
Value creation

1.7 m. people
Employment

66.8 bn. €
Incomes



BÜNDNIS NACHHALTIGE
MOBILITÄTS-
WIRTSCHAFT

 Allianz
pro Schiene

 Bundesverband
Carsharing

 VDV Die Verkehrs-
unternehmen

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On track for the future

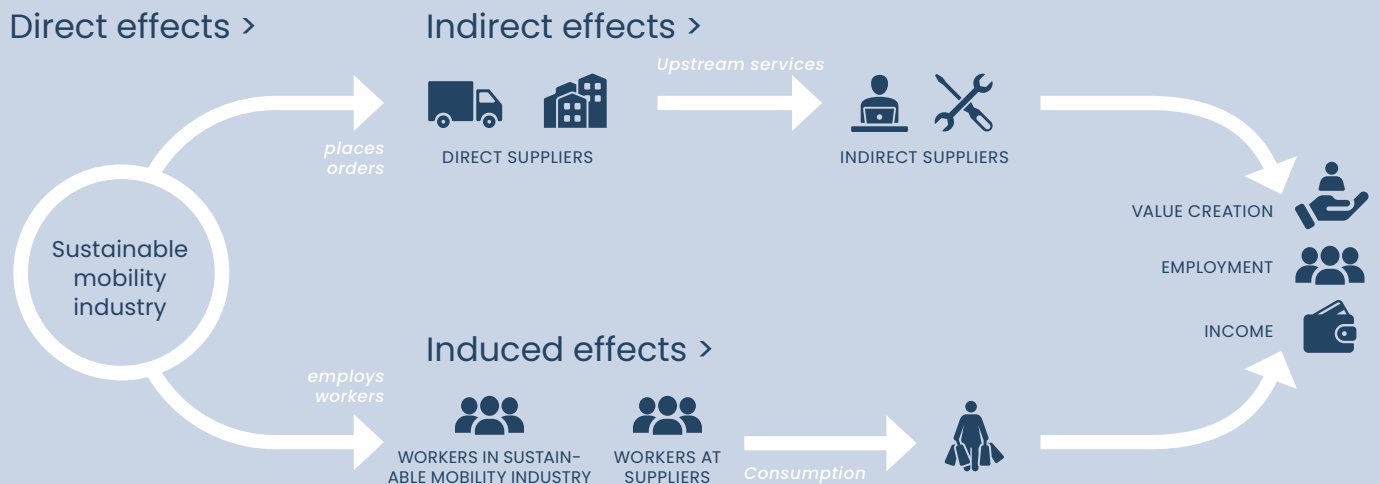
Germany's sustainable mobility industry is already creating a future of green and inclusive transport that serves the common good. It unites under one umbrella a wide variety of transport requirements, climate action and a better quality of life for people in rural and urban areas.

For the first time, the CONOSCOPE Institute has examined the value of the sustainable mobility industry in its entirety to Germany's economy. Its research covered rail, bus, cycling, car sharing and the taxi industry. The findings show that Germany's economy

benefits hugely from companies in the sustainable mobility industry when it comes to value creation, employment and personal income.

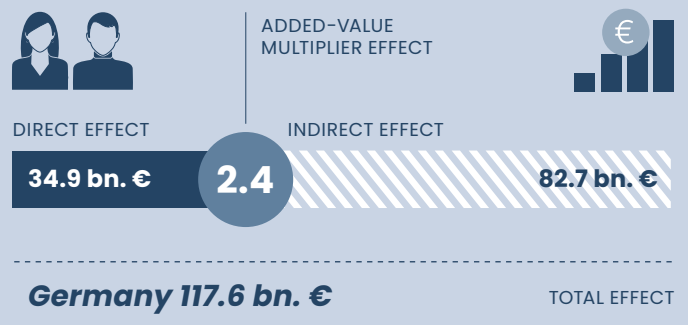
The industry's impact is analysed at three levels:

- direct effects (companies in Germany's sustainable mobility industry)
- indirect effects (upstream services) and
- induced effects (through consumption by directly or indirectly employed workers)



Value-adding effects

- In total, around €118 billion of value creation in Germany is generated by the sustainable mobility industry. This represents approximately 3.3 percent of the country's total gross value added.
- Each euro of direct value added by companies in these sectors generates a further € 2.40 in added value for Germany. This multiplier effect is disproportionately higher than for other sectors.
- The result is a value-adding effect of € 82.7 billion.



Through capital investment and spending on materials, the sustainable mobility industry boosts demand by € 48.7 billion.

Employment effects

- The sustainable mobility industry's overall impact on employment in Germany equates to more than 1.7 million full-time and part-time employees. This represents 3.2 percent of all people in work in Germany.
- A further 1.2 million jobs are created indirectly in addition to the 499,000 employees in the industry in Germany.
- The job multiplier effect is therefore 2.4. For every job created in the industry, more than two additional jobs are created in Germany. The multiplier effect is thus around average – or slightly above average – compared to other sectors.

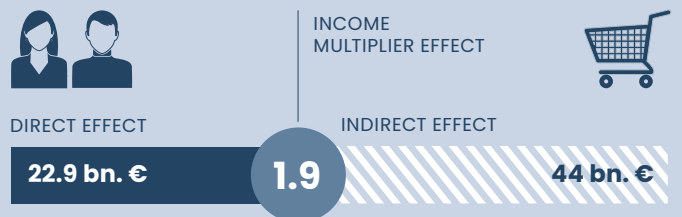


Germany 1.7 m. Employees

TOTAL EFFECT

Income effects

- Personal incomes totalling just under €67 billion are attributable to companies in the sustainable mobility industry in Germany. At the direct level, the amount is €22.9 billion in the region under review. A further €44 billion is added at indirect and induced level via economic interdependencies.
- This equates to an income multiplier effect of 1.9. For every euro of income received by employees in the sustainable mobility industry, an additional €1.90 of income is generated across Germany. This multiplier effect is on a par with other sectors.



Germany 66.8 bn. €

TOTAL EFFECT

How the sustainable mobility industry benefits Germany

The sustainable mobility industry is a major contributor to Germany's economy.

Investment in the industry generates significant added value and employment at the direct, indirect and induced levels. The industry creates many regional, non-relocatable jobs and creates added value locally. It comprises companies of all sizes, from start-ups to major corporations, but is dominated by a large number of small and medium-sized enterprises.

Investment in the sustainable mobility industry offers rewards on many levels:

Boosts value creation and employment

Gives people more options for travelling sustainably

Helps to protect the climate and conserve resources

Benefits health

The **Bündnis nachhaltige Mobilitätswirtschaft** (Alliance of Sustainable Mobility Industries) is the first port of call for policymakers, business, the media and civil society across Germany for all matters related to the sustainable mobility industry and sustainable mobility policies. It represents the interests of the entire sustainable passenger and personal transport sector in Germany, and aims to reconcile people's wide-ranging transport requirements with climate action targets and the reduction of energy consumption in the transport sector.

Allianz pro Schiene (Pro Rail Alliance) is an association of civil society and the railway industry and is committed to increasing the market share of rail transport in Germany.

Bundesverband Carsharing, BCS (Carsharing Association) is the umbrella organisation of German car sharing providers. The aim of the association and its members is to reduce the

number of cars and car traffic as well as their environmental impact.

Verband Deutscher Verkehrsunternehmen, VDV (Association of German Transport Companies) is the industry association for public transport. It is committed to a sustainable transport policy and the expansion of climate-friendly mobility.

Zukunft Fahrrad (Future Bicycle) represents the interests of the innovative bicycle industry in Germany. From start-ups to global players, the members are united by the goal of an ambitious transport and economic policy that promotes cycling.

For further information, please visit:
nachhaltige-mobilitaetswirtschaft.de, or **contact us at** kontakt@nachhaltige-mobilitaetswirtschaft.de

The federation is coordinated by:
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We are Bündnis nachhaltige Mobilitätswirtschaft:



The study '**Sustainable mobility: a key driver of the German economy**' was produced by CONOSCOPE GmbH on behalf of Bündnis nachhaltige Mobilitätswirtschaft.



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