



Netherlands Enterprise Agency

Japanese-Dutch collaborative and economic opportunities related to cycling

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Chapter 1. Introduction

This report explores opportunities for collaboration between Japan and the Netherlands in the field of cycling, both as a form of transportation and recreation. These opportunities are especially timely as Matsuyama in Ehime Prefecture prepares to become the first Japanese city to host the Velo-city Conference—the world’s largest cycling congress—in May 2027.

Japan boasts a widespread and deep-rooted bicycle culture, with 11.5 percent of all journeys made by bike, and cyclists a very visible part of the urban landscape. It is also one of the few countries where female cyclists outnumber their male counterparts. Recreational cycling is also very popular, with a market size of \$6.34 billion in 2024.

In the Netherlands, cycling is integral to daily life, a success rooted in integrated urban and mobility planning. This culture is supported by collaboration among government agencies, knowledge institutes, and private organizations. Dutch expertise, developed through an adaptive approach, offers valuable lessons for countries like Japan seeking to grow cycling.

This report builds on visits from two previous Dutch delegations to Japan, in June 2022 and September 2025. Recommendations are tailored to support the Netherlands Enterprise Agency and interested Dutch organisations, in fostering partnerships, leveraging insights to strengthen ties, and preparing for the 2027 Velo-city Conference in Ehime Prefecture.



Dedicated cycling infrastructure in Kyoto, September 2025 (Credit: Dutch Cycling Embassy)

Chapter 2. The Velo-city Conference

Organised each year by the European Cyclists' Federation (ECF) since its first edition in 1980, the Velo-City Conference brings together approximately 1,500 policymakers, researchers, advocates, urban planners, and industry specialists from around the world to exchange knowledge and ideas on cycling, mobility and sustainable urban development.

Ehime's selection marks the first time the summit will be held in Japan—and the second time in Asia (after Taipei in 2016). The region has built a strong reputation as being cycling-friendly, with 25 percent of work/school commutes made by bike in Matsuyama, and nearly 80 percent of high school students arriving to class by bike. The famous Shimanami Kaido bike route spans 1,000 kilometres and six bridges across islands in the Seto Island Sea.

The region is proactively working on policies like dedicated bike lanes and safety campaigns ("1.5 m Consideration Campaign" for safe passing) as part of its preparation. Ehime also aims to use the conference to boost its international profile, attract visitors (especially cycling tourists), and leave a legacy by spreading its cycling culture beyond the prefecture.

The arrival of the 2027 Velo-city Conference in Ehime Prefecture is an exciting milestone—not just for the region, but for professionals working in cycling across Asia and around the world. It aims to bridge the gap between east and west—and show that places beyond the traditional European context are taking centre-stage in shaping the future of mobility.



Students arrive to Matsuyama High School by bicycle, September 2025 (Credit: Dutch Cycling Embassy)

Chapter 3. Overview of Previous Exchanges

From May 13 to 22, 2022, a small delegation including representatives from the Ministry of Infrastructure and Water Management and the Dutch Cycling Embassy, visited various cities in Japan to explore opportunities for collaboration and knowledge exchange between Dutch experts and Japanese professionals working on improving cycling conditions. This “path finding mission” included high-level meetings with mayors and elected officials in the Kansai and Tokyo metropolitan regions, knowledge exchanges and workshops with urban planners and traffic engineers, presentations to local universities, private enterprises, and citizen groups, and finally a talk and panel discussion during the Tokyo Bike Expo.

On September 23rd, 2025, another delegation was joined by Netherlands Vice-Minister of Infrastructure Afke van Rijn in a special day of cycling-themed activities in the Dutch Pavilion at the Osaka World Expo. This included a series of presentations and conversations from both Dutch and Japanese experts in order to celebrate two leading cycling nations. Later that week, the Dutch delegation travelled to Matsuyama for a workshop titled, “The Meaning of Hosting Velo-City and Learning from Bicycle Policies of Europe”. During that two-day visit, Ehime Prefecture officials invited Dutch experts to share their insights and expertise, as they strive to leave a meaningful and lasting legacy for the 2027 conference.



Dutch Cycling Culture pop-up exhibition in Osaka, September 2025 (Credit: Dutch Cycling Embassy)

Chapter 4. Current Cycling Landscape in Japan

Japan's relationship with the bike is both practical and passionate: it remains a core mode for short trips—shopping and school—while recreational cycling has bloomed in the past decade. The scene is therefore a mix of strong local use (the ubiquitous utility *mamachari*), fast-growing electric-assist technology, and long-distance routes that draw global visitors, and a policy landscape wrestling with safety, parking and fragmented infrastructure.

At street level, Japanese cities rely on a patchwork approach to cycling infrastructure. There are some purpose-built cycle tracks on high-profile routes, but in most cities, cyclists share sidewalks, use painted bike lanes that disappear at junctions, or mix with cars on side streets. That fragmentation shapes behaviour: cycling is functional for short errands, but infrastructure is often inadequate for comfortable commutes or family rides. Riding side-by-side is explicitly prohibited by law, making cycling a solo rather than social activity.

The e-powered growth has brought tensions. Illegal parking of bikes in train-station areas is a major problem—authorities increasingly use paid parking and impounding to tackle it—and pedestrian-cyclist conflicts on congested sidewalks feed public concern about safety. In response, Japan has tightened enforcement aimed at dangerous behaviours: recent legal changes impose stiffer penalties for using mobile phones, cycling under the influence, and other distractions, reflecting an effort to reduce traffic incidents and protect pedestrians.

Looking ahead, several trends are likely to shape cycling in Japan. E-bikes and integrated bike-share systems will continue to lower barriers, especially for older adults and tourists. Local governments will keep investing in signature cycleways that support tourism and local economies, and pilot projects (temporary lanes, parking management, cycle-friendly public transport integration) will test scalable approaches. Systematic gains in safety and usage will require fixing the “last mile” problem—continuous, safe connections at intersections and train stations—so bikes are a comfortable option for more trip types.



Cycle track on Madosuji in Osaka, September 2025 (Credit: Dutch Cycling Embassy)

Chapter 5. Potential Areas of Cooperation

What the Netherlands Can Learn from Japan:

- Internationally renowned recreational cycling routes, such as the Shimanami Kaido, where long distances have been built for cyclists without any stops or interruptions.
- Encouraging cycling to school, especially among teenagers. Japan has great success stimulating and organising high school students to choose the bicycle each day.
- Regulation and legislation of light electric vehicles and charging infrastructure, including how it is being addressed in the design of streets and public spaces.
- Collaboration with manufacturing/retail industry to provide practical, safe bikes and accessories for specific target groups, like women and children. One example is an umbrella holder that clips onto the handlebars to protect cyclists from sun and rain.
- The implementation of national policies to disincentivize car ownership in cities, which frees up precious street space in urban areas for other more valuable uses.
- Use of temporary treatments such as light projections to spotlight high-conflict areas between pedestrians and cyclists, as seen on Madosujij Boulevard in Osaka.

What Japan Can Learn from the Netherlands:

- Technical standards for network and infrastructure design, especially junctions, ideally by translating the CROW Design Manual for Bicycle Design into Japanese.
- Seamless integration of cycling and public transportation through the provision of bike parking at train stations, and a shared bike using the same payment system.
- Bicycle parking could be a learning point for Japan. Especially secure underground facilities in city centres and at public transport to improve the urban environment.
- Traffic calming and circulation in urban areas, so that the speed and volume of cars is reduced, creating low-cost, high-impact corridors that form part of a network
- Designing fully protected intersections and roundabouts to reduce speeds and conflicts, improve safety and flow, and give priority to pedestrians and cyclists.
- Road safety and cycling education in elementary schools, to encourage cycling with children and teach them how to participate in traffic safely and independently.



The mamachari ("mama bike") , September 2025 (Credit: Dutch Cycling Embassy)

Chapter 6. Conclusion and Recommendations

With Velo-city 2027 on the horizon, the timing is perfect and opportunities rich for Dutch organizations to bring their products and services to the Japanese market. Renewed attention to cycling for sport and transport from all levels of government means existing knowledge gaps—from high-quality parking at stations to cohesive network design—are waiting to be filled with international expertise. The next two years will be defined by technological adoption (e-bikes, intermodal integration), targeted infrastructure projects that prioritize continuity, and policy choices balancing enforcement with encouragement to build on Japan's long-standing love affair with the bicycle. This could take the form of:

1. Organise Webinars, Inspiration sessions, Roundtables or ThinkBike workshops to facilitate knowledge exchange.

- It is essential to prioritise the needs of the local situation and its challenges. In doing so, the integration of relevant Dutch expertise can serve as a source of inspiration and provide fresh insights. The activities organised should allow sufficient time and space for in-depth discussions to facilitate the bilateral exchange of knowledge.

2. Organise an Incoming Study Visit to the Netherlands:

- Develop a proposal—possibly with an invitation from the Vice-Minister—for a study visit tailored to Japanese stakeholders. Coordinate with public and private sectors to include officials from diverse departments such as transit, health, and tourism.
- Focus the program (experts, locations, etc.) on the specific topics identified above.

3. Promote High-Quality (Bi)cycle-Related Products:

- E-bikes: Offer solutions for longer commutes and accessibility for older adults or rural/recreational users, leveraging Dutch expertise in e-bike production and usage.
- Secure Parking: Introduce Dutch standards (ie. Fietsparkeur) for secure parking, reducing number of abandoned bikes and improving user confidence. Strategically place facilities in city centres and transit hubs to encourage cycling adoption.

4. Attend the 2027 Velo-city Conference in Ehime:

- Host a special Dutch Japanese networking session at Velo-city 2026 in Rimini, Italy.
- Send a follow-up delegation to meet with Ehime Prefecture in second half of 2026.
- Support Dutch experts in preparing and submitting their abstracts for Velo-city 2027, especially on the topics identified as knowledge gaps from the Japanese side.

5. Organise a dedicated cycling-focused economic trade mission to Japan around the 2027 Velo-city Conference.

- This could engage with professionals working in cycling in cities and regions across the country, and encourage Dutch entrepreneurs to attend the conference, while maximising their investment and presence there.





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