

Bicycle Statistics in Italy

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Studying the bicycle industry can prove to be a very challenging endeavor because of the almost complete lack of data. Scholars, practitioners, and policymakers have to face the dilemma of understanding the activity of bicycling with no, or very little, data. Bicycle statistics play a relevant role in providing a knowledge base to address issues regarding city cycling, new road building, road maintenance, market trends, and other potential decisions that can be improved if data is available. For example, statistics can facilitate measuring the potential number of people using the bicycle as a means of transportation or the potential number of cargo bicycles used for delivering goods. Bicycle statistics can provide clues on the number of cyclists potentially interested in building a new road or can help to establish a linkage between the number of bicycles and road maintenance needs and design. Statistics can highlight which kind of bicycle is preferred by cyclists and how the industry performs over time.

Consequently, it becomes crucial to understand what, if any, data exist, and what gaps and weaknesses affect those data. Despite its relevance, the topic of bicycle statistics is completely neglected, and it is very difficult to find studies aimed at shedding light on the topic. An exception are the contributions of Epperson (2001, 2012), who investigated US bicycle production from 1878 to 1914.

The purpose of this article is to focus on a specific country to analyze the bicycle industry statistics available, highlighting and discussing gaps, and issues of both reliability and comparability. Italy is the country chosen for such an analysis, as it has been and remains a key player in the global bicycle industry since the introduction of the safety bicycle. From 1885 to the 1906, the Italian market mainly

comprised the import of bicycles from England, Germany, and USA. (Piloni, 1985) The Italian bicycle industry took off between 1907 and 1911 as it gained autonomy from foreign markets and built a larger production capacity. Since then, the Italian bicycle companies have become a synonym for high-quality products, particularly for their steel frames, gearing systems, and saddles. Moreover, the Italian bicycles were known for a further distinctive characteristic called *finissage*, a French word that means finishing, making something whole or perfect. Italy is also the country where one of the legends of bicycle road racing was born: *The Giro d'Italia* began in 1909, and it is still runs every year for three weeks in May.

This article is organized into five sections. The first focuses on bicycle ownership statistics and describes the available data from 1895 to 1959. The second section introduces the bicycle production statistics and discusses the data from 1950 to 2017. The third section examines the import-export of both bicycles and frames, focusing attention on the available time series from 1991 to 2017. The fourth section illustrates the concept of apparent consumption, using data from 1994 to 2017. The concluding section discusses implications and potential ways to overcome gaps and address issues of reliability and comparability.

Bicycle ownership statistics

Statistics about bicycle ownership are drawn primarily from magazines published by the Touring Club Ciclistico Italiano (TCCI), a national organization of cyclists focused upon tourism founded in Milan in 1894. Three relevant magazines were reviewed: *Rivista Mensile del T.C.I.* (published from 1895 to 1920), *Le Vie d'Italia* (published from 1917 to 1943 and from 1946 to 1967), and *Le Strade* (published from 1919 to 1943 and from 1946 to 1970). The TCCI used to compile a report of

bicycle ownership that was published in one of the organization's magazines. Raw data were drawn from two sources: bicycle registration plates and membership reports. The first source was based on data gathered by the Ministry of Finance, and it was the prevailing channel used to understand how bicycle ownership evolved over time in the country, whereas the second source was not very frequent, presumably due to practical difficulties and cost issues. Bicycle registration was introduced for taxation purposes in 1897, and every bicycle had to have its own plate, attached to the bicycle frame, showing that the tax was paid. Such registration was a very controversial initiative that aroused the opposition of cyclists and their advocates, such as the TCCI. The tax was reduced in 1910 and then abolished in 1927. It was reintroduced in 1931, and its final abolishment was announced in 1938 (with implementation beginning in 1939). Table 1 shows the available data drawn from varied and scattered sources. The figures cover the time period from 1895 to 1959. It is even more difficult to find further data on bicycle ownership after the 1950s. Table 1 highlights some gaps in the sequence that makes the time series difficult to interpret. The number of bicycles increased approximately tenfold from 1895 to 1905 as shown in Table 1. [There was approximately one bicycle per 150 people in 1901 and one bicycle per 60 people in 1911. There was one bicycle per 23 people in 1921 and one bicycle per 11 people in 1936. There was one bicycle per 6 people in 1951 and one bicycle per 5 people in 1959.]

[Table 1]

Data usually were available if the bicycle registration tax was due, as the Ministry of Finance created its own statistics for taxation purposes. It was more difficult to obtain data on bicycle ownership when the tax was abolished, as happened in some years. In addition to the problem of accessibility, the use of data on the bicycle registration tax for statistical analysis has some drawbacks. First, tax evasion was a relevant issue, and many sources in Table 1 claim that figures usually underestimate the true number of bicycles. There are not any estimates of the size of tax evasion, but the perception is that the problem had a significant impact on the

Table 1 Bicycle ownership in Italy 1895-1959

Year	Bicycle Ownership	Source	Bicycle Ownership	Source	Bicycle Ownership	Source	Bicycle Ownership	Source	Year	Number of Bicycles per Capita
1895	30,000	(a)								
1898			185,000	(t)						
1899	109,019	(b), (c)	200,000	(t)	111,027	(y)			1898-1899	
1900	124,861	(c)	215,000	(t)	128,245	(y)	126,080	(z)	1899-1900	
1901	142,918	(c)	221,000	(t)	141,358	(z)			1900-1901	1/238
1902	174,507	(c)	230,000	(t)						
1903	200,887	(d)	242,000	(t)						
1904			295,000	(t)	239,691	(aa)			1903-1904	
1905			343,000	(t)						
1906			368,000	(t)						
1907			412,000	(t)	368,181	(bb)			1906-1907	
1908			475,000	(t)						
1909			504,000	(t)						
1910			605,000	(t)	606,195	(cc)			1909-1910	
1911					930,651	(cc)			1910-1911	1/40
1912					996,182	(cc)			1911-1912	
1913					1,109,354	(cc)			1912-1913	
1914	1,250,701	(e)								
1915	1,276,476	(e)								
1916	1,070,573	(e)								
1917	1,055,419	(e)								
1918	1,067,069	(e)								
1919	1,363,936	(e)								
1920	1,603,569	(e)								
1921	1,685,533	(e)	1,849,272	(u)					1/22	
1922	1,849,272	(e)								
1923	2,039,161	(e)								
1924	2,224,025	(e)	2,223,995	(h)	2,264,105	(u)				
1925	2,549,718	(f), (g), (h), (i)								
1926	2,896,523	(i)								
1927	3,275,000	(j)								
1928	3,670,000	(j)								
1929	4,070,000	(j)								
1930	4,480,000	(j)								
1932	3,500,000	(k)								
1933	3,476,721	(l), (w)	3,465,791	(v)			3,443,767	(x)		
1934	3,655,460	(l)	3,650,050	(v)	3,554,940	(w)	3,637,588			
1935	3,992,076	(l)					3,962,951			
1936	4,019,509	(m)					4,047,540			1/11
1937	4,493,124	(n)					4,504,961			
1938	4,935,019	(o)					4,954,117			
1939	6,000,000	(p)								
1940	4,000,000	(q)								
1941	5,000,000	(q)								
1946	8,000,000	(r)								
1949	8,000,000	(r)								
1950	8,000,000	(r)								
1951	8,000,000	(r)								1/6
1952	8,000,000	(r)								
1953	8,000,000	(r)								
1954	7,000,000	(r)								
1955	7,000,000	(r)								
1959	10,870,000	(s)								1/5

Sources: (a) Johnson (1896); (b) Bertarelli (1900); (c) Anonymous (1903); (d) Anonymous (1904); (e) Ceriani (1926); (f) Anonymous (1926); (g) Spaventa Filippi (1927); (h) Vandone (1927a); (i) Vandone (1927b); (j) Vandone (1930); (k) Vandone (1934); (l) Anonymous (1936); (m) Anonymous (1937); (n) Anonymous (1938); (o) Anonymous (1939); (p) ANCMA (1953); (q) Anonymous (1942); (r) Roghi (1956); (s) Luzzatto Fegiz (1960); (t) Roseo (1912); (u) Anonymous (1924); (v) Vandone (1935); (w) Gazzaniga (1935); (x) Biffi (1941); (y) Bianchi (1901); (z) Brentari (1902); (aa) Anonymous (1905); (bb) Bianchi (1908); (cc) Bertarelli (1915).

reliability of the statistics. Second, there was a tax exemption for some kind of bicycles, such as military and police bicycles; consequently, figures do not include those bicycles. It is not possible to know how many bicycles were exempted, but the military and police still used bicycles as a means of transportation until the 1940s. Third, the figures should match the number of bicycles, but this is not necessarily true. Some sources claim that a better interpretation is the number of registration plates or the number of cyclists. This means that some cyclists, who owned more than one bicycle, attempted to pay the registration tax just once even though they were required to pay it for each bicycle. They simply moved the plate from one bicycle to another. Available data do not make it possible to know the average number of bicycles owned by each cyclist, but it is reasonable to state that the majority of Italian families had more than one bicycle, as it was the most affordable means of transportation. Fourth, bicycle registration statistics were determined for taxation purposes and very seldom distinguished among bicycles, tandems, tricycles, quadricycles, and motorized bicycles. Figures usually include all these vehicles, and it is not possible to know the quantity for each category. It is plausible to state that bicycles were the majority of these vehicles. Fifth, the Ministry of Finance used a fiscal year that was different from the calendar year, and statistics follow the former in some cases, whereas in other cases, they follow the latter. The comparability of the time series is jeopardized, as it is not always clear on which year (fiscal or calendar) the available data are based.

Table 1 is organized to emphasize the discrepancies and inconsistencies arising from the different sources (see bottom of table). There are four columns each for Bicycle ownership and for Source. For each year, the reader can see the available figures, the alternative figures (when they exist), and the sources reported in the reference section of the article. There are some data (highlighted in blue color) in the upper-right corner of Table 1 that the sources reported according to fiscal year. Such a year usually began on July 1 and ended on June 30 of the next year (for example, from July 1, 1898, to

June 30, 1899). It is clear from Table 1 that bicycle statistics often contradict each other and, in many cases, are rough estimates that require caution in interpretation. A possible explanation of discrepancies and inconsistencies, besides the drawbacks already mentioned, is copy error where data are drawn from the bicycle registration tax, as the figures were passed from one level of the bureaucracy to the next. If there were no data available because the registration tax was not due, the most plausible explanation is that figures are the result of an estimation process. It would be necessary to know exactly how the figures were compiled to understand the process of estimation and say something about the results. The sources usually do not provide any information about how they derived the figures, and it is thus very difficult to make any judgment. For example, data from 1898 to 1902 highlight a significant discrepancy among the available sources (Bertarelli, 1900; Anonymous, 1904; Roseo, 1912) that presumably is explained through the tax evasion issue. This means that the source (Roseo, 1912) had made some estimations to take into account the number of cyclists who did not pay the registration tax. In other cases, the sources clearly stated that they simply provide an estimate of bicycle ownership. This was the case for 1927 to 1932 (Vandone, 1927b); (Vandone, 1934) and 1939 to 1955 (ANCMA, 1953; Anonymous, 1942;



Figure 1. Bicycle production in Italy 1950-2017.

Roghi, 1956). A further example is 1924, for which three different figures are available. Their size is very similar, except for one source (Anonymous, 1924) that reported that the number of bicycles (2,264,105) referred to the first five months of 1924. The last example is 1959, which represents a completely different source (Luzzatto Fegiz, 1960), as it is a survey conducted by a private firm engaged in public opinion research. The survey is based on a probability sample of the Italian population, and it provides a broader picture of bicycle ownership and the

characteristics of Italian families that relate to bicycle ownership.

Bicycle production statistics

The second group of statistics is focused on bicycle production, and the source is the Associazione Nazionale del Ciclo Motociclo e Accessori (ANCMA). This is the Italian national association of private companies that make bicycles, motorcycles, accessories, components, and helmets and was founded in Milan in 1920. ANCMA data are available on the statistical section of their website for 1950-2017 (www.ancma.it). The time series is incomplete before 1950, and very few data are available from scattered sources. The available data show two main limitations. First, the data represent an estimate of the domestic production of bicycles, not actual production. Second, the process of estimation is based on the assumption that one bicycle frame is equivalent to one bicycle. ANCMA makes an estimate of the number of frames, both manufactured in Italy and imported, that becomes a proxy for the number of bicycles produced every year (Nigrelli, 2018). According to ANCMA, the bicycle production estimate has a margin of error of plus or minus 50,000 bicycles. Although the time series is 68 years long, it seems more reasonable to state that such a margin of error applies to the recent years, presumably since the 2000s. More-

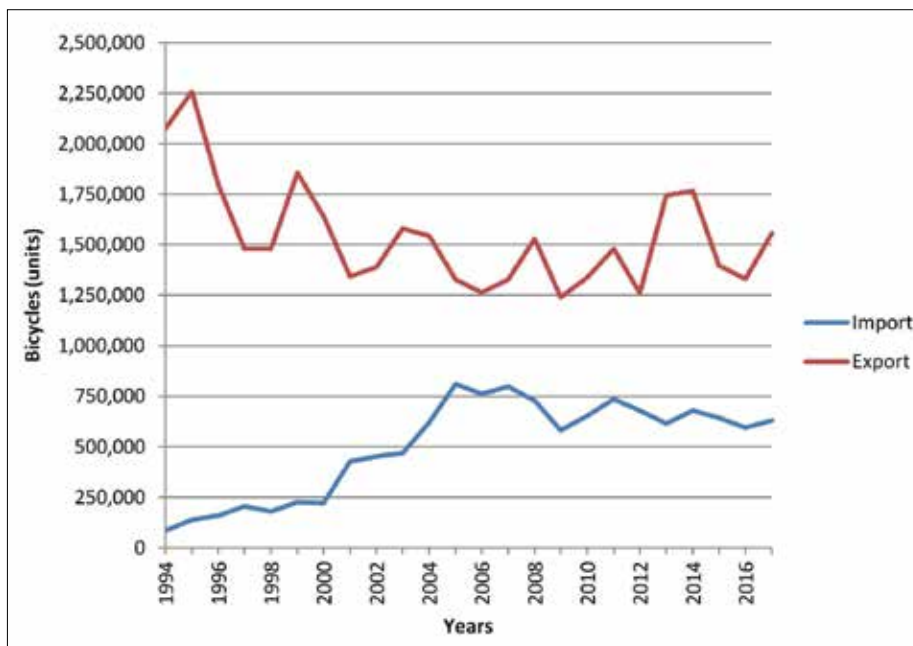


Figure 2. Bicycle import-export in Italy 1994-2017.

over, it is not clear how the number of bicycle frames is estimated, particularly the domestic production of frames. The number of imported bicycle frames is not an estimate, as such data are available through the official statistics provided ex-post by the Italian Customs Agency. A further issue stemming from the estimation process is that we do not know if ANCMA has changed estimation methods over time. If more than one method of estimation was used, a comparability issue has to be considered. [Figure 1]

A plot of the available data is shown in Figure 1; interpretation is difficult because of the limitations already explained and demands a richer contextual explanation that is beyond the scope of this article. The time series reveals a first period, from 1950 to 1958, characterized by steady bicycle production of approximately 400,000 pieces. In the subsequent period, from 1959 to 1965, bicycle production increased 2.5 times and reached approximately 1,000,000 pieces. From 1966 to 1978 and from 1979 to 1989, bicycle production showed a further growth of 100%, reaching 2,000,000 pieces and 3,000,000 pieces, respectively. The years from 1990 to 1994 are the last growth trend in the complete time series. The peak, of 5,800,000 bicycles, occurred in 1994. A significant decline whereby bicycle production was reduced by approximately 60% began in 1995 and continued until 2002. Bicycle production fluctuated downward from 2002 to 2017 and then upward to approximately 2,400,000 pieces at the end of this period.

Import and export statistics

The third group of statistics regards the import and export of bicycles and bicycle frames. Data are developed by the Istituto Nazionale di Statistica (ISTAT), the Italian public office for national statistics, and drawn from the Italian Customs Agency records. This data set is available for a short time series covering recent years in the foreign trade section of ISTAT website (www.coeweb.istat.it), specifically bicycles from 1994 to 2017 and bicycle frames from 1991 to 2017. Import and export data are gathered at country borders using a form in which a code number is assigned to goods according to their

characteristics. The bicycle data presented here are based on the Combined Nomenclature (CN) that represents the customs goods classification nomenclature of the European Union. In turn, CN is based on the Harmonized Commodity Description and Coding System (also known as the HS). All imported or exported goods must be classified in accordance with the CN. Such a classification uses an 8-digit code number. This means that the level of disaggregation is higher than that of other classifications (such as the HS that uses a 6-digit code number). The more digits there are in the code, the more precise the classification; consequently, the possibility of identifying the goods and

bicycles and 1991 for bicycle frames. Bicycles and bicycle frames usually were combined with other product categories, preventing any deeper analysis. [Figure 2]

The plot of bicycle import and export data is shown in Figure 2. The 2017 data are still provisional and subject to change when the final revision from ISTAT will be available. The import of bicycles is characterized by a growth trend between 1994 and 2005, when the number of imported bicycles increased tenfold, reaching approximately 811,000 in 2005. From 2006 to 2017, the import of bicycles fluctuated upward and downward by approximately 700,000 pieces. The export of bicycles

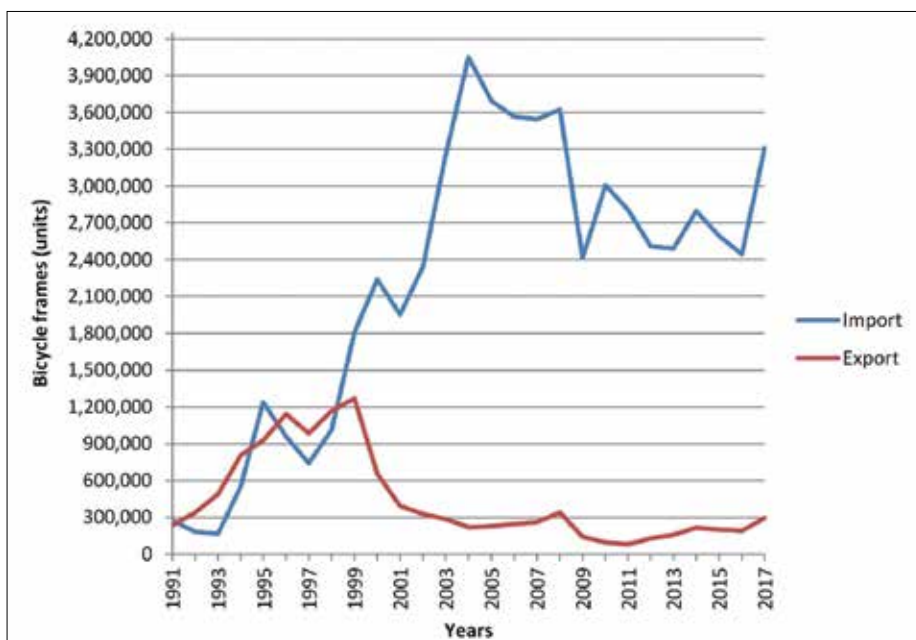


Figure 3. Bicycle frame import-export in Italy 1991-2017

the gathering of relevant data increases as well. The available data stems from the following code numbers: 87120030 (Bicycles with ball bearings) and 87149110 (Frames) according to the most recent issue of the *Official Journal of the European Union* (OJ, 2017). The main drawback of import and export data based on CN is that the classification changes repeatedly over time, particularly the level of data aggregation that, in turn, affects the possibility of isolating bicycles from other goods. This means that the issue of data accuracy becomes an issue of data availability and explains why the time series is so short. It is not possible to identify both these goods within the import and export data before 1994 for

shows a declining trend. Italy exported more than 2 million bicycles from 1994 to 1995, whereas the number of exported bicycles decreased to an average of 1.5 million bicycles in subsequent years. [Figure 3]

Data on the import and export of bicycle frames are reported in Figure 3. As already explained, the 2017 data are provisional. The import of bicycle frames shows an almost nine-fold increase from 1991 to 2002, eventually reaching 2,340,000 pieces. The number of imported frames rose sharply from 2003 to 2004 and reached a peak of 4,051,000 pieces. From 2005, there was a decrease characterized by upward and downward fluctuations, and the average number of bicycle frames was approx-

imately 3 million. The export of Italian bicycle frames was significant between 1991 and 1999. There was a more than five-fold increase, and the figure eventually reached 1,268,000 pieces. From 2000 to 2004, however, there was a dramatic decrease that reduced frame exports by approximately 87%. Since 2005, the average number of exported bicycle frames was approximately 200,000 pieces. Despite the limitations of import and export data, the figures about bicycle frames tell us an unpleasant truth regarding the Italian bicycle industry. Italian bicycle companies are progressively replacing the manufacturing of frames with the import of products, presumably from Asia.

Apparent consumption

The previous statistics, particularly those related to bicycle production and the import and export of bicycles, are used to create a further statistic called apparent consumption. This is derived residually as the difference between domestic production and net exports. Domestic production is the data on bicycle production provided by ANCMA, and net exports are the algebraic sum of import and export data provided by ISTAT. The concept of apparent consumption is usually used as a proxy for bicycle unit sales because no other data are available to understand the size of the bicycle market of a specific country in a specific year. Although such a practice is understandable, it is flawed conceptually and methodologically. The concept of bicycle unit sales is different from that of apparent consumption. The former is the number of bicycles actually sold, while the latter combines the estimate of bicycles manufactured and the number of bicycles actually imported and exported. Apparent consumption is also problematic from a methodological perspective, as it does not account for inventory at the retail and wholesale levels. This means that it is not possible to know how many bicycles remain unsold. Bicycle production data provide an estimate of what was manufactured but do not determine the actual number of bicycles sold. Even though the net exports are based on actual data, they do not necessarily indicate that an imported or exported bicycle was also sold; it could still be unsold at some point within the

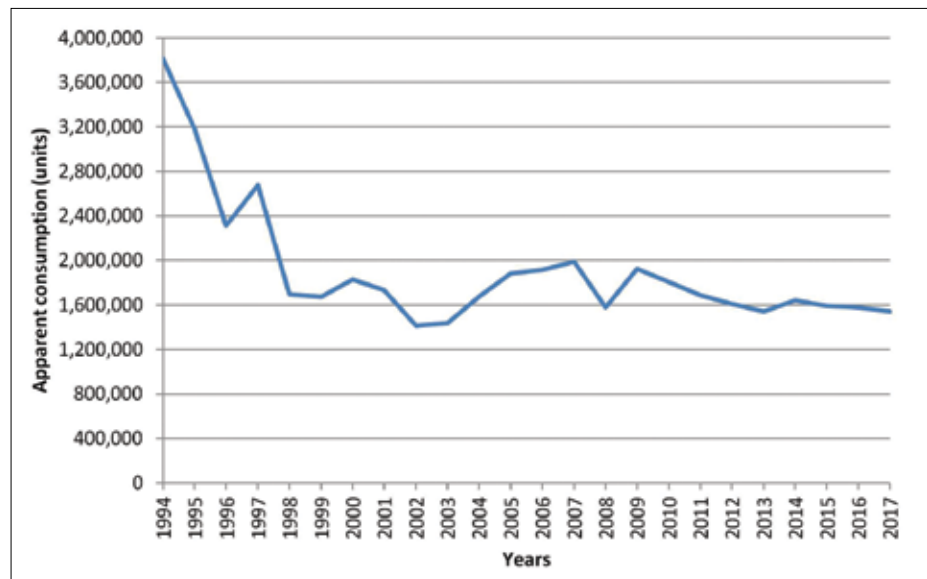


Figure 4. Apparent consumption of bicycle in Italy 1994-2017.

distribution channels. [Figure 4]

The available data makes it possible to plot apparent consumption from 1994 to 2017. [Figure 4] The interpretation of this information requires caution because of the limitations highlighted earlier and the composite nature of such a variable. Moreover, the use of apparent consumption seems more appropriate when the focus of the analysis is on understanding the status of the domestic market rather than the status of industry performance. The plot shows that apparent consumption decreased by approximately 56% from 1994 to 1999, and it fluctuated in subsequent years, reaching an average of approximately 1,700,000 bicycles. It seems that the situation of the domestic market worsened, presumably because of fiercer foreign competition that led to both the decrease in bicycle production and the increase in bicycle imports.

Conclusion

The outline of the available bicycle statistics in Italy substantiates the idea that too many gaps and issues of reliability and comparability still impact the potential application of those data for both informative and decision-making purposes. Regarding bicycle ownership statistics, it is advisable to encourage an in-depth search for new sources of historical evidence and simultaneously perform a periodical survey (for example, every four years) to monitor how the relationship between Italians and bicycles develops over

time. Regarding bicycle production statistics, further historical analysis requires examining company archives or other sources that can provide a different perspective from that of the ANCMA. At the present time, such a task seems very difficult to pursue because there is no indication of any archive that covers the bicycle industry. To overcome the limitations of the current process of bicycle production estimation, it would be necessary to consider a completely new way of gathering these statistics. For example, ANCMA could decide to focus its attention on the actual data of both production and sales through the involvement of its members and other companies engaged in the Italian bicycle market. Of course, such an approach requires more resources (such as skills, money, and time), but it would supply more reliable and comparable statistics that, in turn, could provide a better knowledge base for the entire bicycle industry and its stakeholders. Regarding import and export data, the key issue remains the classification of goods adopted by the European Union. It is difficult to imagine that a historical analysis can fill these gaps, as it would require endless work on the forms used by the Italian Customs Agency to gather import and export data. What is probably more feasible is to ask for a more detailed code number based on 9 digits, such as those used in other countries (for example, Japan), that allow for a better identification of bicycle categories. ●

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Conference Flash Back



Lorne Shields, known for his collection of vintage cycling photographs, finds his own image in an old cycling scrapbook brought to the 2016 ICHC in North Haven, Connecticut.