

Light Electric Vehicles (LEVs) Market by Vehicle Category, Application (Personal Mobility, Shared Mobility, Recreation & Sports, Commercial), Power Output (Less than 6 kW, 6-9 kW, 9-15 kW), Component Type, Vehicle Type Region - Global Forecast to 2027

<https://marketpublishers.com/r/L8988E10E509EN.html>

Date: October 2022

Pages: 410

Price: US\$ 4,950.00 (Single User License)

ID: L8988E10E509EN

Abstracts

The light electric vehicle market is projected to grow from USD 78.5 billion in 2022 to USD 122.7 billion by 2027, registering a CAGR of 9.4%. E-ATV/UTVs, e-bike, e-scooter, e-motorcycle, neighbourhood electric vehicle, e-lawn mower (robotic e-lawn mower and manual e-lawn mower), electric industrial vehicle, autonomous forklifts, delivery robots, and automated guided vehicles were mapped as part of this research. The growth of battery and motor technology and government efforts to reduce emissions in urban areas has increased the demand for LEVs vehicles over the years. With the rapid setup of charging stations worldwide, demand for LEVs such as , e-bike, e-scooter, e-motorcycle, and neighbourhood electric vehicle (golf cart/others) has also increased. Technological breakthroughs in EV batteries and other EV technologies have made it possible to have high-power engines in electric ATVs and UTVs for off-roading (comparable to their ICE counterparts). This will create a shift in demand for electric ATVs and UTVs in the coming years. The LEV market is primarily dominated by players like Textron Inc. (US), Polaris Inc. (US), John Deere (US), Yamaha Motor Co. Ltd. (Japan), Club Car Inc. (US), and BMW AG (Germany). The top key players in the e-ATV/UTV segment of the LEV market are Polaris Inc. (US), Toyota Industries (Japan), John Deere (US), and Textron Inc. (US). The top key players in the e-Bike segment of the LEV market are Accell Group NV (Netherlands), Merida Industry Co. Ltd. (Taiwan), Giant Manufacturing Co. Ltd. (Taiwan), and Yamaha Motor Company (Japan). The top key players in the e-scooter/motorcycle segment of the LEV market are Yadea Grup Holding Ltd. (China), Niu International (China), Zhejiang Luyuan Electric Vehicles Co. Ltd. (China), Hero Electric (India), and Jiangsu Xinri E-Vehicle (China). The top key

players in the neighborhood electric vehicles segment of the LEV market are Textron Inc. (US), Yamaha Motor Co. Ltd. (Japan), The Toro Company (US), and John Deere (US). The top key players in the e-lawn mowers segment of the LEV market are John Deere (US), Honda Motor Co. Ltd. (Japan), The Toro Company (US), Yamabiko Corporation (Japan), and Husqvarna (Austria). The top key players in the light electric industrial vehicles segment of the LEV market are BYD (China), Yutong (China), and AB Volvo (Sweden). These players have worked on providing offerings for the LEV ecosystem. They have initiated partnerships to develop their LEV technology and offer best-in-class products to their customers.

“Personal and commercial LEVs to be the largest segment in market during the forecast period”

The increasing price of petroleum products is the primary factor driving the Light electric vehicle market for personal and commercial use. Electrical systems are more durable and efficient in regular use than mechanical models because they break less often due to a lesser number of moving parts, and hence less friction and wear. The lifetime ownership cost or total cost of ownership (TCO) is projected to decrease compared to a vehicle with an IC engine contributing to a further increase in demand for LEVs for personal and commercial use like e-ATVs/UTVs, neighborhood electric vehicles, e-bikes, e-scooters, and e-motorcycles and some special purpose vehicles like e-lawn mowers. For instance, to tap into the growing demand, Ecocharger, the UK manufacturer of all-electric ATVs and UTVs Ecocharger intends to increase the number of its dealerships in Europe. This suggests that either out of concern for the environment or to comply with rules or to reduce maintenance and usage costs, consumers are asking for more e-ATVs/UTVs. This, in turn, will augment revenues for the LEV market in the personal, commercial and recreational segments during the forecast period.

The number of warehouses per nation is rising as a result of the expanding demand to support the hub and spoke model in e-commerce, automotive component manufacturing, consumer products, and electronics sectors. Over the next five years, the warehouse and fulfilment sector is anticipated to increase by double digits, driving up demand for electric utility vehicles. The US ranks second among the top 10 e-commerce nations, with penetration increasing from roughly 10% of all retail sales in 2019 to approximately 15% in 2020. According to the US Bureau of Labor Statistics, there will be 19,194 warehouses in the US in 2020, up from 15,255 in 2011. By 2027, it is expected that worldwide online e-commerce sales will have doubled, adding almost 28,500 new warehouses to the stock. The European e-commerce market has grown by

24% from 2020-2021 according to the European e-commerce report 2022 and the Asia Pacific e-commerce market registered a growth of 20% from 2020 to 2021 according to the insider intelligence report of 2022. The increased number of warehouses will likely lead to heightened demand for industrial LEVs attributed to their low maintenance and usage costs, dependability, and better load-carrying and handling capabilities. Most businesses provide electric forklifts, pallet trucks, tow tractors, and other vehicles for various end-use sectors. Due to their compliance with Tier 4 emission standards and lack of in-plant emissions, industrial LEVs are typically preferred by end users. Players are producing eco-friendlier industrial vehicles by manufacturing them in eco-friendly factories.

“GROWING SALES OF E-BIKES, E-SCOOTERS, AND E-MOTORCYCLES TO DRIVE THE LEV MARKET”

Two-wheeled vehicles use electric motors to attain motion. The electricity is stored in a rechargeable battery, which drives the electric motors. These vehicles are zero-emission electric motor-driven vehicles. The operating speed and top speed of electric two-wheelers are based on battery technology.

Scooters and bikes are easy-to-operate two-wheelers with a step-through frame and a platform for the user's feet. These two-wheelers are affordable, lightweight, and easy to commute. On the other hand, motorcycles are heavier, faster, and bigger than scooters/mopeds. Depending on the requirement, these two-wheelers have different body designs and frames. The electric versions of scooters and motorcycles are powered by electricity stored in their batteries. Electronic systems are more resistant than mechanical models because they break less often due to less friction and less wear. As a result, electric two-wheelers last longer and reduce the environmental impact compared to fuel-powered vehicles. Manufacturers are expected to develop two-wheelers with a higher range than the current breed of electric two-wheelers. In May 2021, Yadea Group Holdings Ltd. launched the Yadea Champion 2.0 series of e-scooters equipped with the world-leading TTFAR 8 extended-range system. In March 2022, Okinawa Autotech also launched an electric scooter, Okinawa okhi90, which features 16-inch alloy wheels and a range of 160 km.

“Asia Pacific to lead LEV market in coming years by value”

Asia Pacific was the largest market for LEVs and accounted for approximately 59% of the market in 2021 by value, owing to the large-scale sale of LEVs wherein China was the largest and India was the fastest growing market. The market is supported by local

and national incentives like the drafted law of India in July 2022 wherein all the fleet operators should have a 100% electric vehicle fleet, and innovative business models built around LEVs like delivery and transportation services, vehicle renting/leasing for personal, commercial, and industrial uses, and others. The demand is equally increasing for B2B & B2C segments, with final consumers asking for different products which are Technologically advanced, light in weight, removable, and easily changeable. This is expected to drive competitive pricing in the market. The market in Asia Pacific is estimated to be the largest and is estimated to demonstrate healthy growth in the future years.

Key drivers over the forecast period for personal mobility use are government subsidies and incentives, low maintenance and running costs, rapidly developing infrastructure around LEVs. For commercial and industrial use, the main drivers are zero/strict emission norms, benefits from government in terms of tax saving, subsidies, easy availability of renewable energy, and vehicle tracking & automation capabilities. Inflation and supply chain disruption due to the Ukraine and Russia War may affect the LEV market on a short term but a speedy recovery and increasing demand post this is expected.

Since, most of the LEV components manufacturing is done in the Asia Pacific region, many disruptive and constructive trends in the LEV components segments like swap stations for batteries with companies like NIO having the largest battery swap station in China as of May 2022 and entering the European market according to company's website, mid motor with chain drive, and other methods are seen to develop which are expected to drive the market demand even higher.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: Tier I – 67%, Tier II– 9%, and OEMs – 24%

By Designation: CXOs – 33%, Managers – 52%, Executives – 15%

By Region: North America – 25%, Europe – 34%, Asia Pacific – 41%

The LEV market is primarily dominated by players like Textron Inc., Polaris Inc., John Deere, Yamaha Motor Co., Ltd., Club Car Inc., and BMW AG. The top key players in the

e-ATV/UTV segment of the LEV market are Polaris Inc., Toyota Industries, John Deere, and Textron Inc. The top key players in the e-Bike segment of the LEV market are Accell Group NV (Netherlands), Merida Industry Co. Ltd. (Taiwan), Giant Manufacturing Co. Ltd. (Taiwan), and Yamaha Motor Company (Japan). The top key players in the e-scooter/motorcycle segment of the LEV market are Yadea Grup Holding Ltd. (China), Niu International (China), Zhejiang Luyuan Electric Vehicles Co. Ltd. (China), Hero Electric (India), and Jiangsu Xinri E-Vehicle (China). The top key players in the neighborhood electric vehicles segment of the LEV market are Textron Inc. (US), Yamaha Motor Co. Ltd. (Japan), The Toro Company (US), and John Deere (US).. The top key players in the e-lawn mowers segment of the LEV market are John Deere (US), Honda Motor Co. Ltd. (Japan), The Toro Company (US), Yamabiko Corporation (Japan), and Husqvarna (Austria). The top key players in the light electric industrial vehicles segment of the LEV market are BYD (China), Yutong (China), and AB Volvo (Sweden). These players have worked on providing offerings for the LEV ecosystem. They have initiated partnerships to develop their LEV technology and offer best-in-class products to their customers.

Research Coverage:

The report covers the LEV market based on vehicle category, application, power output, component type, Vehicle Type, and region (North America, Europe and Asia-Pacific). It covers the competitive landscape and company profiles of the major players in the LEV ecosystem.

The study also includes an in-depth competitive analysis of the key market players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

This report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the overall LEV and LEV components ecosystem and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

This report will also help stakeholders understand the market's pulse and

provide information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

TABLE 1 LIGHT ELECTRIC VEHICLE MARKET DEFINITION, BY VEHICLE TYPE

TABLE 2 LIGHT ELECTRIC VEHICLE MARKET DEFINITION, BY COMPONENT

1.2.1 INCLUSIONS & EXCLUSIONS

TABLE 3 INCLUSIONS & EXCLUSIONS IN LIGHT ELECTRIC VEHICLE MARKET

1.3 MARKET SCOPE

FIGURE 1 MARKETS COVERED

1.3.1 REGIONS COVERED

1.3.2 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

TABLE 4 CURRENCY EXCHANGE RATES

1.5 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 LIGHT ELECTRIC VEHICLE MARKET: RESEARCH DESIGN

FIGURE 3 RESEARCH DESIGN MODEL

2.1.1 SECONDARY DATA

2.1.1.1 Key secondary sources for light electric vehicle market

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 List of participating companies for primary research

2.1.2.2 Key industry insights

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.1.2.3 Major objectives of primary research

2.2 MARKET SIZE ESTIMATION

FIGURE 5 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

2.2.1 BOTTOM-UP APPROACH

FIGURE 6 BOTTOM-UP APPROACH: LIGHT ELECTRIC VEHICLE MARKET

2.2.2 TOP-DOWN APPROACH

FIGURE 7 TOP-DOWN APPROACH: LIGHT ELECTRIC VEHICLE MARKET

FIGURE 8 TOP-DOWN APPROACH: BY COMPONENT, LIGHT ELECTRIC VEHICLE MARKET

FIGURE 9 LIGHT ELECTRIC VEHICLE MARKET: MARKET ESTIMATION NOTES

FIGURE 10 LIGHT ELECTRIC VEHICLE MARKET: RESEARCH DESIGN & METHODOLOGY – DEMAND SIDE

2.3 DATA TRIANGULATION

FIGURE 11 DATA TRIANGULATION METHODOLOGY

FIGURE 12 MARKET GROWTH PROJECTIONS FROM DEMAND-SIDE DRIVERS AND OPPORTUNITIES

2.4 FACTOR ANALYSIS

2.4.1 FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES

2.5 RESEARCH ASSUMPTIONS

2.6 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 14 LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (VOLUME)

FIGURE 15 BY VEHICLE TYPE, E-MOTORCYCLE SEGMENT PROJECTED TO REGISTER HIGHEST CAGR FROM 2022 TO 2027

FIGURE 16 BY COMPONENT, BATTERY PACK SEGMENT ESTIMATED TO LEAD MARKET FROM 2022 TO 2027

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN LIGHT ELECTRIC VEHICLE MARKET

FIGURE 17 INCREASING ADOPTION BY END-USE INDUSTRIES AND GOVERNMENT INCENTIVES TO DRIVE MARKET IN NEXT FIVE YEARS

4.2 LIGHT ELECTRIC VEHICLE MARKET, BY REGION

FIGURE 18 ASIA PACIFIC ESTIMATED TO DOMINATE LIGHT ELECTRIC VEHICLE MARKET IN 2022

4.3 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE

FIGURE 19 E-BIKE SEGMENT PROJECTED TO LEAD MARKET FROM 2022 TO 2027

4.4 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE CATEGORY

FIGURE 20 3-WHEELER SEGMENT PROJECTED TO RECORD HIGHEST CAGR DURING FORECAST PERIOD

4.5 LIGHT ELECTRIC VEHICLE MARKET, BY APPLICATION

FIGURE 21 PERSONAL MOBILITY SEGMENT EXPECTED TO LEAD MARKET FROM 2022 TO 2027

4.6 LIGHT ELECTRIC VEHICLE MARKET, BY POWER OUTPUT

FIGURE 22 9-15 KW SEGMENT PROJECTED TO RECORD HIGHEST CAGR DURING FORECAST PERIOD

4.7 LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT

FIGURE 23 BATTERY PACK SEGMENT ESTIMATED TO LEAD MARKET IN 2022

5 MARKET OVERVIEW

5.1 INTRODUCTION

TABLE 5 LEV AND LEV COMPONENTS MARKET: IMPACT OF MARKET DYNAMICS

5.2 MARKET DYNAMICS

FIGURE 24 LIGHT ELECTRIC VEHICLES: MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Low operating and maintenance costs

FIGURE 25 TCO OF LEVS VS. ICE VEHICLES PER DISTANCE DRIVEN, 2022 (USD)

FIGURE 26 TCO OF LEVS VS. ICE VEHICLES PER DISTANCE DRIVEN, 2025 (USD)

5.2.1.2 Government incentives and subsidies

TABLE 6 GOVERNMENT INCENTIVES, BY COUNTRY

FIGURE 27 AVERAGE FINANCIAL SUBSIDIES AT EV PURCHASE, BY COUNTRY, 2021 (USD)

FIGURE 28 GOVERNMENT TARGETS TO PHASE OUT ICE VEHICLES, 2025–2040

5.2.1.3 Advancements in battery technologies

FIGURE 29 AVERAGE ENERGY DENSITY (WH/L) OF LI-ION BATTERIES, 2017–2031

5.2.1.4 Rising demand from recreational and commercial applications

FIGURE 30 BATTERY SWAPPING SYSTEM

5.2.1.5 Advancements in renewable energy sector

FIGURE 31 VIRTUAL POWER PLANT (VPP) SYSTEM

5.2.2 RESTRAINTS

5.2.2.1 Lack of charging infrastructure and limited vehicle range

FIGURE 32 COUNTRY-WISE EV CHARGER DENSITY

5.2.2.2 High initial cost of ownership

5.2.2.3 Increasing concerns regarding recycling of LEV components

5.2.3 OPPORTUNITIES

5.2.3.1 Decreasing prices of components

FIGURE 33 AVERAGE PRICE OF LIGHT ELECTRIC INDUSTRIAL VEHICLES VS. DIESEL ENGINE VEHICLES, 2022–2030

5.2.3.2 New revenue pockets in Asia Pacific, Africa, and Europe

5.2.3.3 Increasing R&D for advancements

FIGURE 34 BATTERY TECHNOLOGY LANDSCAPE, BY MATERIAL**5.2.4 CHALLENGES****5.2.4.1 Lack of compatibility, interchangeability, and standardization****FIGURE 35 INDIA: BATTERY SWAP STATION FOR LEV (CHARGEZONE)****5.2.4.2 Fluctuating prices of raw materials leading to increasing cost of battery-operated industrial vehicles****FIGURE 36 COPPER (LME) PRICE TREND, JANUARY 2019–AUGUST 2022 (USD PER METRIC TON)****5.3 SUPPLY CHAIN ANALYSIS****FIGURE 37 LEV AND LEV COMPONENTS MARKET: SUPPLY CHAIN ANALYSIS****TABLE 7 LEV AND LEV COMPONENTS MARKET: ECOSYSTEM****5.3.1 RAW MATERIAL SUPPLIERS****5.3.2 COMPONENT MANUFACTURERS****5.3.3 OEMS****5.4 PORTER'S FIVE FORCES****FIGURE 38 PORTER'S FIVE FORCES: LEV AND LEV COMPONENTS MARKET****TABLE 8 LEV AND LEV COMPONENTS MARKET: PORTER'S FIVE FORCES****5.4.1 THREAT OF SUBSTITUTES****5.4.2 THREAT OF NEW ENTRANTS****5.4.3 BARGAINING POWER OF BUYERS****5.4.4 BARGAINING POWER OF SUPPLIERS****5.4.5 INTENSITY OF COMPETITIVE RIVALRY****5.5 MACROECONOMIC INDICATORS****5.5.1 GDP TREND AND FORECAST FOR MAJOR ECONOMIES****TABLE 9 GDP TREND AND FORECAST, MAJOR ECONOMIES, 2018–2026 (USD BILLION)****5.6 BUYING CRITERIA ANALYSIS FOR LEV MARKET****5.6.1 RIDE-HAILING FLEETS****5.6.2 PERSONAL VEHICLE FLEETS****5.6.3 INDUSTRIAL APPLICATIONS****5.6.4 PERSONAL AND COMMERCIAL APPLICATIONS****5.6.5 BUYING CRITERIA****FIGURE 39 KEY BUYING CRITERIA FOR LEVS FOR PERSONAL AND COMMERCIAL/INDUSTRIAL USE****TABLE 10 KEY BUYING CRITERIA FOR LEVS FOR PERSONAL AND COMMERCIAL/INDUSTRIAL USE****5.6.6 KEY STAKEHOLDERS IN BUYING PROCESS****TABLE 11 INFLUENCE OF KEY STAKEHOLDERS ON BUYING LIGHT ELECTRIC VEHICLES FOR COMMERCIAL/INDUSTRIAL USE (%)**

5.7 TECHNOLOGY ANALYSIS

5.7.1 SWAPPABLE BATTERIES AND BATTERY SWAPPING STATIONS

FIGURE 40 TCO OF ICE VS. BATTERY SWAPPING POWERED VEHICLES, 2022

5.7.2 SMART CHARGING SYSTEMS

FIGURE 41 SMART EV CHARGING SYSTEM

5.7.3 IOT FOR AUTOMATED MATERIAL HANDLING

FIGURE 42 IOT FOR AUTOMATED MATERIAL HANDLING IN WAREHOUSES

5.7.4 AI FOR MATERIAL HANDLING

5.8 ECOSYSTEM ANALYSIS

FIGURE 43 LEV AND LEV COMPONENTS MARKET: ECOSYSTEM ANALYSIS

5.8.1 OEMS

5.8.2 RAW MATERIAL SUPPLIERS

5.8.3 COMPONENT MANUFACTURERS

5.9 TRENDS AND DISRUPTIONS: LIGHT ELECTRIC VEHICLE MARKET

FIGURE 44 LEV AND LEV COMPONENTS MARKET: TRENDS AND DISRUPTIONS

5.10 AVERAGE SELLING PRICE ANALYSIS OF LEV AND LEV COMPONENTS

TABLE 12 AVERAGE SELLING PRICE (ASP), BY LEV TYPE

TABLE 13 AVERAGE SELLING PRICE (ASP), BY LEV COMPONENT TYPE

FIGURE 45 PRICE TREND ANALYSIS OF LI-ION BATTERY PER KWH, 2010–2030

5.11 TRADE ANALYSIS

TABLE 14 TRADE ANALYSIS: HS CODE - 870310

TABLE 15 TRADE ANALYSIS: HS CODE - 842710

5.12 PATENT ANALYSIS

5.12.1 INTRODUCTION

FIGURE 46 PUBLICATION TRENDS, 2010–2022

TABLE 16 PATENT ANALYSIS: LEV AND LEV COMPONENTS MARKET (ACTIVE PATENTS)

TABLE 17 LEV AND LEV COMPONENTS MARKET: PATENTED DOCUMENTS (PUBLISHED, FILED, AND GRANTED)

5.13 CASE STUDY ANALYSIS

5.13.1 THYSSENKRUPP'S DECISION FOR FLEXIBLE AUTOMATION

5.13.2 TOYOTA'S AUTOMATED FORKLIFTS SUPPORT ELM LEBLANC'S 4.0 INDUSTRY SOLUTION

5.13.3 INDUCTIVE CHARGING SYSTEM FOR INDUSTRIAL/MATERIAL HANDLING VEHICLES

5.13.4 CLUB CAR'S TEMPO 2+2 FOR KETTERING GENERAL HOSPITAL

5.13.5 GOLF CARTS FOR PERSONAL MOBILITY

5.14 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 19 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 20 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.15 REGULATORY FRAMEWORK

FIGURE 47 EMISSION REDUCTION FRAMEWORK OF MAJOR COUNTRIES, 2021

TABLE 21 EURO VI STANDARDS 2021: EUROPEAN EMISSION NORMS

TABLE 22 US III STANDARDS 2021: US EMISSION NORMS

TABLE 23 CHINA 6A, 6B STANDARDS 2021: CHINA EMISSION NORMS

TABLE 24 JAPAN WLTC STANDARDS 2021: JAPAN EMISSION NORMS

TABLE 25 BRAZIL L-6 STANDARDS 2021: BRAZIL EMISSION NORMS

5.16 CONFERENCES & EVENTS

TABLE 26 LEV AND LEV COMPONENTS MARKET: CONFERENCES & EVENTS

5.17 SCENARIO ANALYSIS (2022–2027)

5.17.1 LIGHT ELECTRIC VEHICLE MARKET: MOST LIKELY SCENARIO

TABLE 27 LIGHT ELECTRIC VEHICLE MARKET: MOST LIKELY SCENARIO, BY REGION, 2022–2027 (THOUSAND UNITS)

5.17.2 LIGHT ELECTRIC VEHICLE MARKET: OPTIMISTIC SCENARIO

TABLE 28 LIGHT ELECTRIC VEHICLE MARKET: OPTIMISTIC SCENARIO, BY REGION, 2022–2027 (THOUSAND UNITS)

5.17.3 LIGHT ELECTRIC VEHICLE MARKET: PESSIMISTIC SCENARIO

TABLE 29 LIGHT ELECTRIC VEHICLE MARKET: PESSIMISTIC SCENARIO, BY REGION, 2022–2027 (THOUSAND UNITS)

6 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE

6.1 INTRODUCTION

FIGURE 48 BY VEHICLE TYPE, E-MOTORCYCLE SEGMENT PROJECTED TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD

TABLE 30 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 31 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 32 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 33 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

6.1.1 OPERATIONAL DATA

TABLE 34 LIGHT ELECTRIC VEHICLE MODELS OFFERED BY COMPANIES, BY VEHICLE TYPE

6.1.2 ASSUMPTIONS

TABLE 35 ASSUMPTIONS: BY VEHICLE TYPE

6.1.3 RESEARCH METHODOLOGY

6.2 ELECTRIC ATV/UTV

6.2.1 INCREASED RECREATIONAL AND AGRICULTURAL ACTIVITIES TO DRIVE MARKET

TABLE 36 E-ATV/UTV: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 37 E-ATV/UTV: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 38 E-ATV/UTV: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 39 E-ATV/UTV: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.3 E-BIKE

6.3.1 GOVERNMENT SUPPORT AND INITIATIVES TO INCREASE E-BIKE SALES

TABLE 40 E-BIKE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 41 E-BIKE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 42 E-BIKE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 43 E-BIKE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.4 E-SCOOTER

6.4.1 RISE IN DEMAND FOR ENERGY-EFFICIENT MODES OF COMMUTING TO BOOST MARKET

TABLE 44 E-SCOOTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 45 E-SCOOTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 46 E-SCOOTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 47 E-SCOOTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.5 E-MOTORCYCLE

6.5.1 INCREASE IN DEMAND FOR PERFORMANCE ELECTRIC TWO-WHEELERS TO DRIVE SEGMENT

TABLE 48 E- MOTORCYCLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 49 E- MOTORCYCLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 50 E- MOTORCYCLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 51 E- MOTORCYCLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.6 NEIGHBORHOOD ELECTRIC VEHICLE

6.6.1 GROWTH OF HOTELS AND RESORTS TO DRIVE DEMAND

TABLE 52 NEIGHBORHOOD ELECTRIC VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 53 NEIGHBORHOOD ELECTRIC VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 54 NEIGHBORHOOD ELECTRIC VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 55 NEIGHBORHOOD ELECTRIC VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.7 E-LAWN MOWER

6.7.1 GOVERNMENT REGULATIONS, DEVELOPMENTS IN BATTERIES, AND LAUNCHES OF VARIOUS ELECTRIC MANUAL/ROBOTIC LAWN MOWER TO DRIVE MARKET

TABLE 56 ELECTRIC LAWN MOWER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 57 ELECTRIC LAWN MOWER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 58 ELECTRIC LAWN MOWER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 59 ELECTRIC LAWN MOWER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.7.2 ROBOTIC E-LAWN MOWER

6.7.2.1 Europe estimated to become largest market for robotic e-lawn mowers

TABLE 60 ROBOTIC E-LAWN MOWER MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 61 ROBOTIC E-LAWN MOWER MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 62 ROBOTIC E-LAWN MOWER MARKET, BY REGION, 2018–2021 (USD

MILLION)

TABLE 63 ROBOTIC E-LAWN MOWER MARKET, BY REGION, 2022–2027 (USD MILLION)

6.7.3 MANUAL E-LAWN MOWER

6.7.3.1 Growing demand for robotic mowers to impact manual e-lawn mower market

TABLE 64 MANUAL E-LAWN MOWER MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 65 MANUAL E-LAWN MOWER MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 66 MANUAL E-LAWN MOWER MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 67 MANUAL E-LAWN MOWER MARKET, BY REGION, 2022–2027 (USD MILLION)

6.8 ELECTRIC INDUSTRIAL VEHICLE

6.8.1 GROWING CO2 EMISSION CONCERNS TO DRIVE SEGMENT

FIGURE 49 CO2 EMISSION REDUCTION BY TOYOTA INDUSTRIES CORPORATION

FIGURE 50 KEY BENEFITS OF ELECTRIC FORKLIFTS

TABLE 68 IC ENGINES VS ELECTRIC MOTORS

TABLE 69 ELECTRIC INDUSTRIAL VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 70 ELECTRIC INDUSTRIAL VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 71 ELECTRIC INDUSTRIAL VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 72 ELECTRIC INDUSTRIAL VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.9 AUTONOMOUS FORKLIFT

6.9.1 FOCUS ON ZERO-EMISSION WORKING ENVIRONMENT TO DRIVE DEMAND

TABLE 73 AUTONOMOUS FORKLIFT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 74 AUTONOMOUS FORKLIFT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 75 AUTONOMOUS FORKLIFT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 76 AUTONOMOUS FORKLIFT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.10 DELIVERY ROBOT

6.10.1 INCREASING USE OF ROBOTS FOR GROCERY DELIVERIES TO DRIVE

MARKET

TABLE 77 DELIVERY ROBOT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 78 DELIVERY ROBOT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 79 DELIVERY ROBOT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 80 DELIVERY ROBOT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.11 AUTOMATED GUIDED VEHICLE

6.11.1 AUTOMATED GUIDED VEHICLES IDEAL FOR HANDLING LARGE VOLUMES OF LOAD AND OFTEN HAVE SIMPLER GUIDE PATH

TABLE 81 AUTOMATED GUIDED VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 82 AUTOMATED GUIDED VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 83 AUTOMATED GUIDED VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 84 AUTOMATED GUIDED VEHICLE: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

6.12 KEY PRIMARY INSIGHTS

7 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE CATEGORY

7.1 INTRODUCTION

FIGURE 51 BY VEHICLE CATEGORY, 2-WHEELER SEGMENT TO DOMINATE MARKET FROM 2022 TO 2027

TABLE 85 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE CATEGORY, 2018–2021 (THOUSAND UNITS)

TABLE 86 LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE CATEGORY, 2022–2027 (THOUSAND UNITS)

7.1.1 OPERATIONAL DATA

TABLE 87 LIGHT ELECTRIC VEHICLE MODELS, BY VEHICLE CATEGORY

7.1.2 ASSUMPTIONS

TABLE 88 ASSUMPTIONS: BY VEHICLE CATEGORY

7.1.3 RESEARCH METHODOLOGY

7.2 2-WHEELER

7.2.1 GROWING SALES OF E-BIKES, E-SCOOTERS, AND E-MOTORCYCLES TO DRIVE SEGMENT

TABLE 89 2-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 90 2-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

7.3 3-WHEELER

7.3.1 GROWING ADOPTION BY LOGISTICS COMPANIES TO DRIVE SEGMENT

TABLE 91 3-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 92 3-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

7.4 4-WHEELER

7.4.1 GROWING USE IN WAREHOUSES, MANUFACTURING PLANTS, AND GOLF COURSES TO DRIVE SEGMENT

TABLE 93 4-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 94 4-WHEELER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

7.5 KEY PRIMARY INSIGHTS

8 LIGHT ELECTRIC VEHICLE MARKET, BY APPLICATION

8.1 INTRODUCTION

FIGURE 52 BY APPLICATION, PERSONAL MOBILITY SEGMENT PROJECTED TO DOMINATE MARKET DURING FORECAST PERIOD

TABLE 95 LIGHT ELECTRIC VEHICLE MARKET, BY APPLICATION, 2018–2021 (THOUSAND UNITS)

TABLE 96 LIGHT ELECTRIC VEHICLE MARKET, BY APPLICATION, 2022–2027 (THOUSAND UNITS)

8.1.1 OPERATIONAL DATA

TABLE 97 POPULAR AND UPCOMING LEVS WORLDWIDE

8.1.2 ASSUMPTIONS

TABLE 98 ASSUMPTIONS: BY APPLICATION

8.1.3 RESEARCH METHODOLOGY

8.2 PERSONAL MOBILITY

8.2.1 VARIED RANGE OF PRODUCTS CLUBBED WITH GOVERNMENT INCENTIVES AND REDUCING PRICES TO DRIVE SEGMENT

TABLE 99 PERSONAL MOBILITY: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 100 PERSONAL MOBILITY: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY

REGION, 2022–2027 (THOUSAND UNITS)

8.3 SHARED MOBILITY

8.3.1 HIGH INITIAL COST OF OWNERSHIP AND LOW OPERATIONAL AND MAINTENANCE COSTS TO DRIVE SEGMENT

TABLE 101 SHARED MOBILITY: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 102 SHARED MOBILITY: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2022–2027 (THOUSAND UNITS)

8.4 RECREATION & SPORTS

8.4.1 GROWING DEMAND FOR OUTDOOR LEISURE AND RECREATIONAL ACTIVITIES TO INCREASE DEMAND

TABLE 103 RECREATION & SPORTS: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 104 RECREATION & SPORTS: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2022–2027 (THOUSAND UNITS)

8.5 COMMERCIAL

8.5.1 GROWING DEMAND IN AGRICULTURE AND INDUSTRIAL APPLICATIONS TO INCREASE SALES OF LEVS

TABLE 105 COMMERCIAL: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 106 COMMERCIAL: LIGHT ELECTRIC VEHICLE MARKET SIZE, BY REGION, 2022–2027 (THOUSAND UNITS)

8.6 KEY PRIMARY INSIGHTS

9 LIGHT ELECTRIC VEHICLE MARKET, BY POWER OUTPUT

9.1 INTRODUCTION

FIGURE 53 BY POWER OUTPUT, LESS THAN 6 KW SEGMENT PROJECTED TO LEAD MARKET FROM 2022 TO 2027

TABLE 107 LIGHT ELECTRIC VEHICLE MARKET, BY POWER OUTPUT, 2018–2021 (THOUSAND UNITS)

TABLE 108 LIGHT ELECTRIC VEHICLE MARKET, BY POWER OUTPUT, 2022–2027 (THOUSAND UNITS)

9.1.1 OPERATIONAL DATA

TABLE 109 LIGHT ELECTRIC VEHICLE MODELS, BY POWER OUTPUT

9.1.2 ASSUMPTIONS

TABLE 110 ASSUMPTIONS: BY POWER OUTPUT

9.1.3 RESEARCH METHODOLOGY

9.2 LESS THAN 6 KW

9.2.1 RISING DEMAND FOR LEVS IN PERSONAL MOBILITY AND INDUSTRIAL APPLICATIONS TO DRIVE SEGMENT

TABLE 111 LESS THAN 6 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 112 LESS THAN 6 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

9.3 6–9 KW

9.3.1 GROWTH OF E-COMMERCE AND HOSPITALITY SECTORS TO DRIVE SEGMENT

TABLE 113 6–9 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 114 6–9 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

9.4 9–15 KW

9.4.1 RISING DEMAND FROM INDUSTRIAL FACILITIES, CONSTRUCTION SITES, WAREHOUSES, PUBLIC TRANSPORTATION, AND AIRPORT FACILITIES TO DRIVE SEGMENT

TABLE 115 9–15 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 116 9–15 KW: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

9.5 KEY PRIMARY INSIGHTS

10 LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT

10.1 INTRODUCTION

FIGURE 54 LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)

TABLE 117 LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 118 LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

10.1.1 OPERATIONAL DATA

TABLE 119 LIGHT ELECTRIC VEHICLE: MAJOR COMPANIES, BY COMPONENT

10.1.2 RESEARCH METHODOLOGY

10.1.3 ASSUMPTIONS

TABLE 120 ASSUMPTIONS: BY COMPONENT

10.2 BATTERY PACK

TABLE 121 BATTERY PACK: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,

2018–2021 (USD MILLION)

TABLE 122 BATTERY PACK: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,
2022–2027 (USD MILLION)

10.3 ELECTRIC MOTOR

TABLE 123 ELECTRIC MOTOR: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,
2018–2021 (USD MILLION)

TABLE 124 ELECTRIC MOTOR: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,
2022–2027 (USD MILLION)

10.4 MOTOR CONTROLLER

FIGURE 55 SIMPLIFIED BLOCK DIAGRAM OF COMMONLY USED MOTOR
CONTROLLERS IN LEVS

TABLE 125 MOTOR CONTROLLER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2018–2021 (USD MILLION)

TABLE 126 MOTOR CONTROLLER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2022–2027 (USD MILLION)

10.5 INVERTER

TABLE 127 INVERTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,
2018–2021 (USD MILLION)

TABLE 128 INVERTER: LIGHT ELECTRIC VEHICLE MARKET, BY REGION,
2022–2027 (USD MILLION)

10.6 POWER CONTROLLER

TABLE 129 POWER CONTROLLER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2018–2021 (USD MILLION)

TABLE 130 POWER CONTROLLER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2022–2027 (USD MILLION)

10.7 E-BRAKE BOOSTER

TABLE 131 E-BRAKE BOOSTER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2018–2021 (USD MILLION)

TABLE 132 E-BRAKE BOOSTER: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2022–2027 (USD MILLION)

10.8 POWER ELECTRONICS

TABLE 133 POWER ELECTRONICS: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2018–2021 (USD MILLION)

TABLE 134 POWER ELECTRONICS: LIGHT ELECTRIC VEHICLE MARKET, BY
REGION, 2022–2027 (USD MILLION)

10.9 KEY INDUSTRY INSIGHTS

11 LIGHT ELECTRIC VEHICLE MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 56 LEV MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 135 LEV MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 136 LEV MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 137 LEV MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 138 LEV MARKET, BY REGION, 2022–2027(USD MILLION)

FIGURE 57 COMPONENT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 139 COMPONENT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 140 COMPONENT: LIGHT ELECTRIC VEHICLE MARKET, BY REGION, 2022–2027 (USD MILLION)

11.2 ASIA PACIFIC

FIGURE 58 ASIA PACIFIC: LIGHT ELECTRIC VEHICLE MARKET SNAPSHOT

TABLE 141 ASIA PACIFIC: LEV MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 142 ASIA PACIFIC: LEV MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 143 ASIA PACIFIC: LEV MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 144 ASIA PACIFIC: LEV MARKET, BY COUNTRY, 2022–2027(USD MILLION)

TABLE 145 ASIA PACIFIC: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 146 ASIA PACIFIC: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

11.2.1 CHINA

11.2.1.1 LEVs in demand for commercial and industrial use due to availability of renewable energy sources

TABLE 147 CHINA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 148 CHINA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 149 CHINA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 150 CHINA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.2.2 JAPAN

11.2.2.1 Technological advancements to benefit and drive demand for LEVs

TABLE 151 JAPAN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 152 JAPAN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 153 JAPAN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 154 JAPAN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.2.3 INDIA

11.2.3.1 Light electric vehicle market to witness rapid growth

FIGURE 59 INCENTIVE AND REGULATORY LANDSCAPE FOR LEVS IN INDIA

TABLE 155 INDIA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (UNITS)

TABLE 156 INDIA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (UNITS)

TABLE 157 INDIA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 158 INDIA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.2.4 SOUTH KOREA

11.2.4.1 Significant growth in demand for LEVs for commercial and industrial use

TABLE 159 SOUTH KOREA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 160 SOUTH KOREA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 161 SOUTH KOREA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 162 SOUTH KOREA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.3 EUROPE

FIGURE 60 EUROPE: LIGHT ELECTRIC VEHICLE MARKET SNAPSHOT

TABLE 163 EUROPE: LEV MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 164 EUROPE: LEV MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 165 EUROPE: LEV MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 166 EUROPE: LEV MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 167 EUROPE: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 168 EUROPE: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

11.3.1 FRANCE

11.3.1.1 E-ATV/UTV and neighborhood electric vehicle segments to dominate LEV

market

TABLE 169 FRANCE: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 170 FRANCE: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 171 FRANCE: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 172 FRANCE: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.3.2 GERMANY

11.3.2.1 Setting up of charging corridors to boost LEV demand

TABLE 173 GERMANY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 174 GERMANY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 175 GERMANY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 176 GERMANY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.3.3 SPAIN

11.3.3.1 Government focus on replacing existing transportation fleets to impact market positively

TABLE 177 SPAIN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 178 SPAIN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 179 SPAIN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 180 SPAIN: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.3.4 ITALY

11.3.4.1 Government incentives to generate higher demand for LEVs & LEV component

TABLE 181 ITALY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 182 ITALY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 183 ITALY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 184 ITALY: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.3.5 UK

11.3.5.1 Increasing adoption in recreation & sports sector to drive market

FIGURE 61 UK EV ROADMAP

TABLE 185 UK: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 186 UK: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 187 UK LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 188 UK: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.4 NORTH AMERICA

FIGURE 62 NORTH AMERICA EV BATTERY INITIATIVES

TABLE 189 NORTH AMERICA: LEV MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 190 NORTH AMERICA: LEV MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 191 NORTH AMERICA: LEV MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 192 NORTH AMERICA: LEV MARKET, BY COUNTRY, 2022–2027(USD MILLION)

TABLE 193 NORTH AMERICA: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 194 NORTH AMERICA: LIGHT ELECTRIC VEHICLE MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

11.4.1 US

11.4.1.1 Growing inclination toward automation in end-use industries to accelerate market growth

TABLE 195 US: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 196 US: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 197 US: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 198 US: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

11.4.2 CANADA

11.4.2.1 E-ATV/UTV segment to dominate light electric vehicle market

TABLE 199 CANADA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (UNITS)

TABLE 200 CANADA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (UNITS)

TABLE 201 CANADA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 202 CANADA: LIGHT ELECTRIC VEHICLE MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 OVERVIEW

12.2 MARKET RANKING ANALYSIS: LIGHT ELECTRIC VEHICLES

12.2.1 MARKET RANKING ANALYSIS: E-ATV/UTV

TABLE 203 MARKET RANKING ANALYSIS: E-ATV/UTV, 2021

12.2.2 MARKET RANKING ANALYSIS: E-BIKE

TABLE 204 MARKET RANKING ANALYSIS: E-BIKE, 2021

12.2.3 MARKET RANKING ANALYSIS: E-SCOOTER/MOTORCYCLE

TABLE 205 MARKET RANKING ANALYSIS: E-SCOOTER/MOTORCYCLE, 2021

12.2.4 MARKET RANKING ANALYSIS: NEIGHBORHOOD ELECTRIC VEHICLES

TABLE 206 MARKET RANKING ANALYSIS: NEIGHBORHOOD ELECTRIC VEHICLES, 2021

12.2.5 MARKET RANKING ANALYSIS: E-LAWN MOWERS

TABLE 207 MARKET RANKING ANALYSIS: E-LAWN MOWERS, 2021

12.2.6 MARKET RANKING ANALYSIS: ELECTRIC INDUSTRIAL VEHICLES

TABLE 208 MARKET RANKING ANALYSIS: ELECTRIC INDUSTRIAL VEHICLES, 2021

12.2.7 MARKET RANKING ANALYSIS: AUTONOMOUS FORKLIFT

TABLE 209 MARKET RANKING ANALYSIS: AUTONOMOUS FORKLIFT, 2021

12.2.8 MARKET RANKING ANALYSIS: AUTOMATED GUIDED VEHICLES

TABLE 210 MARKET RANKING ANALYSIS: AUTOMATED GUIDED VEHICLES, 2021

12.3 MARKET RANKING ANALYSIS: LEV COMPONENTS

TABLE 211 LEV COMPONENTS MARKET RANKING ANALYSIS, 2021

12.3.1 NIDEC CORPORATION

12.3.2 ROBERT BOSCH GMBH

12.3.3 AISIN CORPORATION

12.3.4 BORGWARNER INC.

12.3.5 ZF FRIEDRICHSHAFEN AG

12.4 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS

FIGURE 63 TOP PUBLIC/LISTED PLAYERS IN E-ATV/UTV MARKET, 2017–2021

FIGURE 64 TOP PUBLIC/LISTED PLAYERS IN E-BIKE MARKET, 2017–2021

FIGURE 65 TOP PUBLIC/LISTED PLAYERS IN E-SCOOTER/MOTORCYCLE MARKET, 2017–2021

FIGURE 66 TOP PUBLIC/LISTED PLAYERS IN NEIGHBORHOOD ELECTRIC VEHICLES MARKET, 2017–2021

FIGURE 67 TOP PUBLIC/LISTED PLAYERS IN E-LAWN MOWERS MARKET, 2017–2021

FIGURE 68 TOP PUBLIC/LISTED PLAYERS IN LIGHT ELECTRIC INDUSTRIAL VEHICLES MARKET, 2017–2021

FIGURE 69 TOP PUBLIC/LISTED PLAYERS IN LEV COMPONENTS MARKET, 2017–2021

12.5 COMPETITIVE SCENARIO

12.5.1 NEW PRODUCT LAUNCHES

TABLE 212 NEW PRODUCT LAUNCHES: LIGHT ELECTRIC VEHICLES, 2018–2022

TABLE 213 NEW PRODUCT LAUNCHES: LEV COMPONENTS, 2018–2022

12.5.2 DEALS

TABLE 214 DEALS: LIGHT ELECTRIC VEHICLES, 2018–2022

TABLE 215 DEALS: LEV COMPONENTS, 2018–2022

12.5.3 OTHERS

TABLE 216 OTHERS: LIGHT ELECTRIC VEHICLES, 2018–2022

TABLE 217 OTHERS: LEV COMPONENTS, 2018–2022

12.6 COMPANY EVALUATION QUADRANT: LIGHT ELECTRIC VEHICLES MARKET

12.6.1 STARS

12.6.2 EMERGING LEADERS

12.6.3 PERVASIVE PLAYERS

12.6.4 PARTICIPANTS

FIGURE 70 LIGHT ELECTRIC VEHICLES MARKET: COMPANY EVALUATION QUADRANT, 2022

TABLE 218 LEV MARKET: COMPANY FOOTPRINT, 2022

TABLE 219 LEV MARKET: PRODUCT FOOTPRINT, 2022

TABLE 220 LEV MARKET: REGIONAL FOOTPRINT, 2022

12.7 COMPANY EVALUATION QUADRANT: LEV COMPONENTS MARKET

12.7.1 STARS

12.7.2 EMERGING LEADERS

12.7.3 PERVASIVE PLAYERS

12.7.4 PARTICIPANTS

FIGURE 71 LEV COMPONENTS MARKET: COMPANY EVALUATION QUADRANT,

2022

TABLE 221 LEV COMPONENTS MARKET: COMPANY FOOTPRINT, 2022

TABLE 222 LEV COMPONENTS MARKET: PRODUCT FOOTPRINT, 2022

TABLE 223 LEV COMPONENTS MARKET: REGIONAL FOOTPRINT, 2022

13 COMPANY PROFILES

(Business overview, Products offered, Recent developments & MnM View)*

13.1 KEY PLAYERS (LIGHT ELECTRIC VEHICLE MANUFACTURERS)

13.1.1 BMW AG

TABLE 224 BMW AG: BUSINESS OVERVIEW

FIGURE 72 BMW AG: COMPANY SNAPSHOT

TABLE 225 BMW AG: PRODUCTS OFFERED

TABLE 226 BMW AG: NEW PRODUCT LAUNCHES

TABLE 227 BMW AG: DEALS

13.1.2 AURO ROBOTICS

TABLE 228 AURO ROBOTICS: BUSINESS OVERVIEW

TABLE 229 AURO ROBOTICS: PRODUCTS OFFERED

TABLE 230 AURO ROBOTICS: NEW PRODUCT LAUNCHES

TABLE 231 AURO ROBOTICS: DEALS

TABLE 232 AURO ROBOTICS: OTHERS

13.1.3 CLUB CAR INC.

TABLE 233 CLUB CAR INC.: BUSINESS OVERVIEW

TABLE 234 CLUB CAR INC.: PRODUCTS OFFERED

TABLE 235 CLUB CAR INC.: NEW PRODUCT LAUNCHES

TABLE 236 CLUB CAR INC.: DEALS

13.1.4 POLARIS INC.

TABLE 237 POLARIS INC.: BUSINESS OVERVIEW

FIGURE 73 POLARIS INC.: COMPANY SNAPSHOT

FIGURE 74 POLARIS: MARKET OPPORTUNITY

FIGURE 75 POLARIS: OFF-ROAD SEGMENT GROWTH RESULTS

TABLE 238 POLARIS INC.: PRODUCTS OFFERED

TABLE 239 POLARIS INC.: NEW PRODUCT LAUNCHES

TABLE 240 POLARIS INC.: DEALS

13.1.5 TEXTRON INC.

TABLE 241 TEXTRON INC.: BUSINESS OVERVIEW

FIGURE 76 TEXTRON INC.: COMPANY SNAPSHOT

FIGURE 77 TEXTRON: COMPARISON OF E-Z-GO WITH OTHER ELECTRIC GOLF CARTS

TABLE 242 TEXTRON INC.: PRODUCTS OFFERED

TABLE 243 TEXTRON INC.: NEW PRODUCT LAUNCHES

TABLE 244 TEXTRON INC.: DEALS

TABLE 245 TEXTRON: OTHERS

13.1.6 TOYOTA INDUSTRIES CORPORATION

TABLE 246 TOYOTA INDUSTRIES CORPORATION: BUSINESS OVERVIEW

FIGURE 78 TOYOTA INDUSTRIES CORPORATION: COMPANY SNAPSHOT

FIGURE 79 TOYOTA INDUSTRIES CORPORATION: SEGMENT-WISE GROWTH

TABLE 247 TOYOTA INDUSTRIES CORPORATION: PRODUCTS OFFERED

TABLE 248 TOYOTA INDUSTRIES CORPORATION: NEW PRODUCT LAUNCHES

TABLE 249 TOYOTA INDUSTRIES CORPORATION: DEALS

13.1.7 JOHN DEERE

TABLE 250 JOHN DEERE: BUSINESS OVERVIEW

FIGURE 80 JOHN DEERE: COMPANY SNAPSHOT

TABLE 251 JOHN DEERE: PRODUCTS OFFERED

TABLE 252 JOHN DEERE: NEW PRODUCT LAUNCHES

TABLE 253 JOHN DEERE: DEALS

TABLE 254 JOHN DEERE: OTHERS

13.1.8 KION GROUP

TABLE 255 KION GROUP: BUSINESS OVERVIEW

FIGURE 81 KION GROUP: COMPANY SNAPSHOT

FIGURE 82 KION GROUP: INDUSTRY PERFORMANCE, 2021

TABLE 256 KION GROUP: PRODUCTS OFFERED

TABLE 257 KION GROUP: NEW PRODUCT LAUNCHES

TABLE 258 KION GROUP: DEALS

13.1.9 BYD AUTO CO., LTD.

TABLE 259 BYD AUTO CO., LTD.: BUSINESS OVERVIEW

FIGURE 83 BYD AUTO CO., LTD.: COMPANY SNAPSHOT

FIGURE 84 BYD AUTO CO., LTD.: RANGE OF ELECTRIC FORKLIFTS

TABLE 260 BYD AUTO CO., LTD.: PRODUCTS OFFERED

TABLE 261 BYD AUTO CO., LTD.: NEW PRODUCT LAUNCHES

TABLE 262 BYD AUTO CO., LTD.: DEALS

13.1.10 ARI MOTORS

TABLE 263 ARI MOTORS: BUSINESS OVERVIEW

TABLE 264 ARI MOTORS: PRODUCTS OFFERED

TABLE 265 ARI MOTORS: NEW PRODUCT LAUNCHES

TABLE 266 ARI MOTORS: DEALS

13.1.11 WAEV INC.

TABLE 267 WAEV INC.: BUSINESS OVERVIEW

TABLE 268 WAEV INC.: PRODUCTS OFFERED

TABLE 269 WAEV INC.: NEW PRODUCT LAUNCHES

TABLE 270 WAEV INC.: DEALS

13.1.12 COLUMBIA VEHICLE GROUP INC.

TABLE 271 COLUMBIA VEHICLE GROUP INC.: BUSINESS OVERVIEW

TABLE 272 COLUMBIA VEHICLE GROUP INC.: PRODUCTS OFFERED

TABLE 273 COLUMBIA VEHICLE GROUP INC.: NEW PRODUCT LAUNCHES

TABLE 274 COLUMBIA VEHICLE GROUP INC.: DEALS

13.1.13 YAMAHA MOTOR CO., LTD.

TABLE 275 YAMAHA MOTOR CO., LTD.: BUSINESS OVERVIEW

FIGURE 85 YAMAHA MOTOR CO., LTD.: COMPANY SNAPSHOT

TABLE 276 YAMAHA MOTOR CO., LTD.: PRODUCTS OFFERED

TABLE 277 YAMAHA MOTOR CO., LTD.: NEW PRODUCT LAUNCHES

13.1.14 GODREJ MATERIAL HANDLING

TABLE 278 GODREJ MATERIAL HANDLING: BUSINESS OVERVIEW

TABLE 279 GODREJ MATERIAL HANDLING: PRODUCTS OFFERED

TABLE 280 GODREJ MATERIAL HANDLING: NEW PRODUCT LAUNCHES

TABLE 281 GODREJ MATERIAL HANDLING: DEALS

13.1.15 ADDAX MOTORS

TABLE 282 ADDAX MOTORS: BUSINESS OVERVIEW

TABLE 283 ADDAX MOTORS: PRODUCTS OFFERED

TABLE 284 ADDAX MOTORS: NEW PRODUCT LAUNCHES

TABLE 285 ADDAX MOTORS: DEALS

13.1.16 MARSHELL

TABLE 286 MARSHELL: BUSINESS OVERVIEW

TABLE 287 MARSHELL: PRODUCTS OFFERED

13.2 KEY PLAYERS (LEV COMPONENT MANUFACTURERS)

13.2.1 NIDEC CORPORATION

TABLE 288 NIDEC CORPORATION: BUSINESS OVERVIEW

FIGURE 86 NIDEC CORPORATION: COMPANY SNAPSHOT

TABLE 289 NIDEC CORPORATION: PRODUCTS OFFERED

TABLE 290 NIDEC CORPORATION: NEW PRODUCT LAUNCHES

TABLE 291 NIDEC CORPORATION: DEALS

TABLE 292 NIDEC CORPORATION: OTHERS

13.2.2 AISIN CORPORATION

TABLE 293 AISIN CORPORATION: BUSINESS OVERVIEW

FIGURE 87 AISIN CORPORATION: COMPANY SNAPSHOT

TABLE 294 AISIN CORPORATION: PRODUCTS OFFERED

TABLE 295 AISIN CORPORATION: NEW PRODUCT LAUNCHES

TABLE 296 AISIN CORPORATION: DEALS

TABLE 297 AISIN CORPORATION: OTHERS

13.2.3 BORGWARNER INC.

TABLE 298 BORGWARNER INC.: BUSINESS OVERVIEW

FIGURE 88 BORGWARNER INC.: COMPANY SNAPSHOT

TABLE 299 BORGWARNER INC.: PRODUCTS OFFERED

TABLE 300 BORGWARNER INC.: NEW PRODUCT LAUNCHES

TABLE 301 BORGWARNER INC.: DEALS

TABLE 302 BORGWARNER INC.: OTHERS

13.2.4 ROBERT BOSCH GMBH

TABLE 303 ROBERT BOSCH GMBH: BUSINESS OVERVIEW

FIGURE 89 ROBERT BOSCH GMBH: COMPANY SNAPSHOT

TABLE 304 ROBERT BOSCH GMBH: SUPPLY AGREEMENTS

TABLE 305 ROBERT BOSCH GMBH: PRODUCTS OFFERED

TABLE 306 ROBERT BOSCH GMBH: NEW PRODUCT LAUNCHES

TABLE 307 ROBERT BOSCH GMBH: DEALS

TABLE 308 ROBERT BOSCH GMBH: OTHERS

13.2.5 ZF FRIEDRICHSHAFEN AG

TABLE 309 ZF FRIEDRICHSHAFEN AG: BUSINESS OVERVIEW

FIGURE 90 ZF FRIEDRICHSHAFEN AG: COMPANY SNAPSHOT

TABLE 310 ZF FRIEDRICHSHAFEN AG: PRODUCTS OFFERED

TABLE 311 ZF FRIEDRICHSHAFEN AG: NEW PRODUCT LAUNCHES

TABLE 312 ZF FRIEDRICHSHAFEN AG: DEALS

TABLE 313 ZF FRIEDRICHSHAFEN AG: OTHERS

13.2.6 NINGBO YINZHOU HENTACH ELECTROMECHANICAL CO., LTD.

TABLE 314 NINGBO YINZHOU HENTACH ELECTROMECHANICAL CO., LTD:
BUSINESS OVERVIEW

TABLE 315 NINGBO YINZHOU HENTACH ELECTROMECHANICAL CO., LTD:
PRODUCTS OFFERED

13.2.7 MOTOR APPLIANCE CORPORATION (MAC)

TABLE 316 MOTOR APPLIANCE CORPORATION(MAC): BUSINESS OVERVIEW

TABLE 317 MOTOR APPLIANCE CORPORATION(MAC): PRODUCTS OFFERED

13.2.8 MAHLE GROUP

TABLE 318 MAHLE GROUP: BUSINESS OVERVIEW

FIGURE 91 MAHLE GROUP: COMPANY SNAPSHOT

TABLE 319 MAHLE GROUP: PRODUCTS OFFERED

TABLE 320 MAHLE GROUP: NEW PRODUCT LAUNCHES

TABLE 321 MAHLE GROUP: DEALS

TABLE 322 MAHLE GROUP: OTHERS

13.2.9 ACCELERATED SYSTEMS INC.

TABLE 323 ACCELERATED SYSTEMS INC.: BUSINESS OVERVIEW

TABLE 324 ACCELERATED SYSTEMS INC.: PRODUCTS OFFERED

TABLE 325 ACCELERATED SYSTEMS INC.: DEALS

13.2.10 CURTIS INSTRUMENTS INC.

TABLE 326 CURTIS INSTRUMENTS INC.: BUSINESS OVERVIEW

TABLE 327 CURTIS INSTRUMENTS INC.: PRODUCTS OFFERED

TABLE 328 CURTIS INSTRUMENTS INC.: NEW PRODUCT LAUNCHES

TABLE 329 CURTIS INSTRUMENTS INC.: DEALS

TABLE 330 CURTIS INSTRUMENTS INC.: OTHERS

13.2.11 QS MOTOR LTD.

TABLE 331 QS MOTOR LTD.: BUSINESS OVERVIEW

TABLE 332 QS MOTOR LTD.: PRODUCTS OFFERED

13.2.12 CRYSTALYTE MOTORS

TABLE 333 CRYSTALYTE MOTORS: BUSINESS OVERVIEW

TABLE 334 CRYSTALYTE MOTORS: PRODUCTS OFFERED

13.2.13 PROTEAN ELECTRIC

TABLE 335 PROTEAN ELECTRIC: BUSINESS OVERVIEW

TABLE 336 PROTEAN ELECTRIC: PRODUCTS OFFERED

TABLE 337 PROTEAN ELECTRIC: DEALS

TABLE 338 PROTEAN ELECTRIC: OTHERS

13.2.14 NTN GROUP

TABLE 339 NTN GROUP: BUSINESS OVERVIEW

FIGURE 92 NTN GROUP: COMPANY SNAPSHOT

TABLE 340 NTN GROUP: PRODUCTS OFFERED

13.2.15 NSK LTD.

TABLE 341 NSK LTD.: BUSINESS OVERVIEW

FIGURE 93 NSK LTD.: COMPANY SNAPSHOT

TABLE 342 NSK LTD.: PRODUCTS OFFERED

TABLE 343 NSK LTD.: NEW PRODUCT LAUNCHES

13.2.16 ELAPHE PROPULSION TECHNOLOGIES LTD.

TABLE 344 ELAPHE PROPULSION TECHNOLOGIES LTD.: BUSINESS OVERVIEW

TABLE 345 ELAPHE PROPULSION TECHNOLOGIES LTD.: PRODUCTS OFFERED

TABLE 346 ELAPHE PROPULSION TECHNOLOGIES LTD.: DEALS

*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

13.3 OTHER PLAYERS

13.3.1 GOVECS GROUP

13.3.2 LIT MOTORS INC.

- 13.3.3 MAGNA INTERNATIONAL
- 13.3.4 CONTINENTAL AG
- 13.3.5 WETTSEN CORPORATION
- 13.3.6 EVUM MOTORS
- 13.3.7 ALKE
- 13.3.8 CFMOTO
- 13.3.9 PILOT CAR ELECTRIC VEHICLES
- 13.3.10 BALKAN CAR RECORD
- 13.3.11 DRR USA
- 13.3.12 LINHAI
- 13.3.13 NEBULA AUTOMOTIVE PVT. LIMITED
- 13.3.14 AMERICAN LANDMASTER
- 13.3.15 ECO CHARGER
- 13.3.16 EXCAR
- 13.3.17 SUZHOU EAGLE ELECTRIC VEHICLE
- 13.3.18 POWERLAND AGRO TRACTOR VEHICLES
- 13.3.19 CROSSFIRE MOTORCYCLES
- 13.3.20 VOLCON
- 13.3.21 TESLA INC.
- 13.3.22 AUTO RENNEN INDIA
- 13.3.23 SMART CART

14 RECOMMENDATION

- 14.1 ASIA PACIFIC TO BE KEY MARKET FOR LEVS
- 14.2 KEY FOCUS AREAS FOR LEV MANUFACTURERS: RISING E-COMMERCE SECTOR AND STANDARD SAFETY FEATURES
- 14.3 CONCLUSION

15 APPENDIX

- 15.1 KEY INSIGHTS FROM INDUSTRY EXPERTS
- 15.2 DISCUSSION GUIDE
- 15.3 KNOWLEDGESTORE: MARKET SAND MARKETS SUBSCRIPTION PORTAL
- 15.4 AVAILABLE CUSTOMIZATIONS
- 15.5 RELATED REPORTS
- 15.6 AUTHOR DETAILS

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