

China Low-speed Electric Vehicle Industry Report, 2015-2018

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Abstracts

Due to extremely low price and cost of usage and very high price/performance ratio, low-speed electric vehicle wins great popularity among people from all walks of life in third and fourth-tier cities and vast rural areas in China with a flourishing market. In 2014, China produced 427,000 low-speed electric vehicles, a 41.4% jump from a year ago. The figure reached nearly 300,000 in the first half of 2015.

From the perspective of competitive landscape, brand concentration in electric bicycle market segment is relatively low, with top4 manufacturers together seizing a merely 33.9% market share and top10 ones only 46.4%. There is little difference in functional configuration of products of electric tricycle manufacturers, the prices are very close to each other, and brands have not yet been built. Low-speed electric vehicle industry has developed rapidly, and high profit margins have attracted influx of electric bicycle and tricycle manufacturers into the field, intensifying the competition.

Introduction of Interim Provisions on Administration of Investment Projects and Production Access of Newly-built Battery Electric Passenger Vehicle Manufacturers by the National Development and Reform Commission didn't give low-speed electric vehicle expected legal status. In the face of massive market demand, most of manufacturers take a wait-and-see attitude, while some stronger companies secure the qualifications for passenger vehicle production and enter the mini electric vehicle field through transformation & upgrading or cooperation.

We believe that, as mini electric vehicle and low-speed electric vehicle aim at similar market, and mini electric vehicle will gradually displace low-speed electric vehicle due to the former's markedly lifted price/performance ratio caused by continuously declining costs, growth rate of low-speed electric vehicle will slow down over the next couple

years.

China Low-speed Electric Vehicle Industry Report, 2015-2018 focuses on the followings:

Overview of low-speed electric vehicle industry in China, including development history, industry characteristics, and major policies;

Market size, regional development, competitive landscape, and development trends of main market segments including electric bicycle, electric tricycle, and low-speed electric vehicle;

Competitive landscape of key parts (including battery, motor and controller) for low-speed electric vehicle, main products, and advantages & disadvantages of manufacturers;

Analysis of 16 major manufacturers including Yadea, AIMA, Xinri, Byvin, Jinpeng, Dojo, YOGOMO, Shifeng Group, Tokng, GreenWheel EV, KNDI, Lichi, and Baoya, covering profile, financial position, main products, R&D, production base, and technical features.

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