



**China Low-speed Electric Vehicle(LSEV)
Industry Report, 2016-2020**

Aug. 2016

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

It takes only less than ten years for China's low-speed electric vehicle (LSEV) industry to grow from an infant to a behemoth with its output surging from 23,000 units in 2009 to 688,000 units in 2015 at a CAGR of up to 76.2%. In April 2016, the Standardization Administration of the People's Republic of China (SAC) solicited public opinions on the Technical Specifications of Four-wheeled Low-speed Electric Passenger Vehicle, giving a glimmer of hope to the LSEV industry stranded in policy grey zone.

Despite absence of industry standards and legal grounds for running on the road, LSEV, with merits of great mobility and low use cost, enjoys huge market potential in rural areas and urban-rural fringe areas. As industry standards become increasingly clear and the industry more regulated, the market potential will be further unleashed over the next couple of years. It is expected that China's output of LSEVs will hit 2.044 million units in 2020 at a CAGR of 24.3% over 2015.

Market Share of Chinese LSEV Manufacturers, 2015



Regarding competitive landscape, the market finds a relatively low concentration with Shifeng, YOGOMO, and LEVDEO being the top3 players in the market. Shifeng has been the market leader for three years in a row, the first company with annual output of more than 100,000 units. YOGOMA, a electric vehicle brand under BYVIN, produces mainly D70, D50 and V60 with annual output of about 80,000 units. YOGOMO, the largest low-speed electric vehicle in Hebei province, has four brands (YOGOMO, CYAHOR, YGM, and Lewei) with annual output of 70,000 units or so. High profit margins in rapidly-developing low-speed electric vehicle industry have attracted a large number of two-wheeled and three-wheeled electric vehicle manufacturers (SUNRA, BYVIN, etc.) and companies from other sectors (like Loncin via acquisition of Baoya) to enter the field, intensifying competition.

Meanwhile, some manufacturers scale up investment to expand LSEV capacity. Dojo began construction of Gaoyou base in early 2015; LEVDEO started building its Phase II low-speed electric vehicle project in 2015; the contract for YOGOMO Wuxi Project was signed in January 2016; the agreement for BaoyaXiangyang Project was signed in May 2016. With the launch of these projects, the competition in LSEV industry will prick up.

China Low-speed Electric Vehicle Industry Report, 2016-2020 highlights the followings:

- Overview of LSEV industry in China (definition, classification, development trends, etc.);
- Market segments (electric bicycle, electric tricycle, LSEV, and all-terrain vehicle) of LSEV (industry standards, relevant policies, market size, competitive landscape, development trends, etc.);
- Market for relevant key parts (battery, motor, and motor controller) (competitive landscape, manufacturers, etc.);
- major manufacturers (Yadea, AIMA, SUNRA, BYVIN, Jinpeng, Dojo, YOGOMO, Xinyuzhou, Shifeng Group, Tokng, Fulu Vehicle, LEVDEO, KNDI, Rainchst, Lichi, and Baoya) (profile, financial position, leading products, R&D, distribution of production bases, technical features, etc.)

**LSEV Capacity Expansion Projects of Some Chinese Companies,
2015-2016**

Company	Project	Predicted Date of Operation	Main Product	Estimated New Capacity
YOGOMO	YOGOMO Wuxi Project	Jun 2017	LSEV	150,000
Dojo	Gaoyou Base	Second half of 2016	LSEV	150,000
Baoya	Xiangyang Project	May 2017	High and low-speed electric vehicle	Phase I: 200,000 Phase II: 300,000
LEVDEO	Phase II	Aug 2016	LSEV	200,000

Source: China Low-speed Electric Vehicle Industry Report, 2016-2020 by ResearchInChina

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