

China Low-speed Electric Vehicle (LSEV) Industry Report, 2017-2021

June 2017

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.

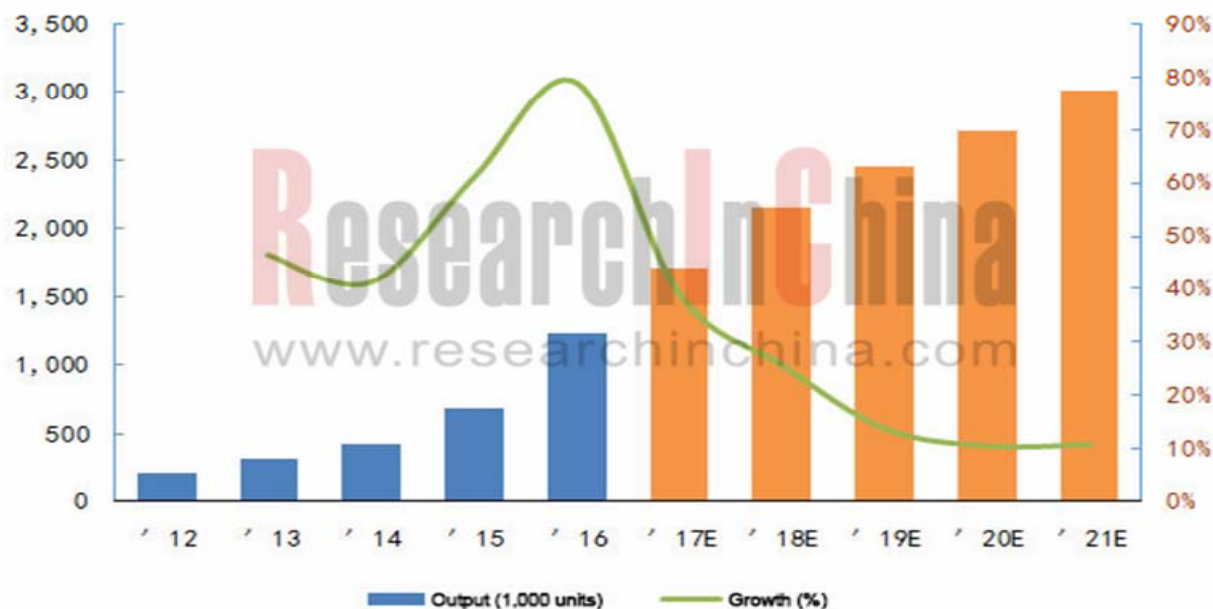
INFORMATION SOURCES

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

Abstract

Despite absence of industry standards and of the basis for running on the road, low-speed electric vehicle (LSEV) still enjoys a huge market in rural and periurban areas because of mobility and low use costs. It takes less than a decade for the LSEV industry in China to grow from infancy and take shape. The Standardization Administration of the People's Republic of China showed the intention to adopt stricter standards and meanwhile the State Council defined the guideline of "upgrading a batch, regulating a batch, and eliminating a batch" last year. Even so, LSEV output still soared from 688,000 units in 2015 to 1.232 million units in 2016, an upsurge of 79.1% year on year.

China's LSEV Output and Forecast, 2012-2021



Data Source: China Low-speed Electric Vehicle (LSEV) Industry Report, 2017-2021

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BYVIN, YOGOMO, and DOJO are the top3 players in the LSEV market. BYVIN, as a market bellwether, is the first enterprise with annual output of more than 150,000 units by adopting multi-brand (including LEVDEO) strategy to expand its market share in all market segments; YOGOMO, the largest LSEV enterprise in Hebei province, boasts four brands (YOGOMO, CYAHOR, YGM, and LaVie) and produces about 110,000 units annually; DOJO, the largest LSEV maker in Jiangsu province, put its Gaoyou base (with capacity of 230,000 units/a) into production in May 2017, and ranked third with output of 90,000 units last year.

Although the LSEV industry has grown rapidly in China, industry standards and policies remain unclear. In light of this, some companies, such as GreenWheel and Henan SD, jumped out of LSEV field and entered micro high-speed electric vehicle industry and have obtained the license for the production of battery electric vehicle. Meanwhile, there are still many makers that are still optimistic about the market and have increased investment, like YOGOMO's two 150,000 unit/a LSEV projects in Mengzhou and Qinghe and Baoya's 500,000 unit/a NEV base in Xiangyang city.

China Low-speed Electric Vehicle (LSEV) Industry Report, 2017-2021 highlights the following:

- ◆ Overview of the LSEV industry in China (definition, classification, development trends, etc.);
- ◆ LSEV market segments including electric bicycle, electric tricycle, LSEV, and all-terrain vehicle (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.);
- ◆ 16 major manufacturers (Yadea, AIMA, SUNRA, BYVIN, Jinpeng, Dojo, YOGOMO, BYVIN, Shifeng Group, Tokng, Fulu Vehicle, LEVDEO, KNDI, Lichi, Rainchst, and Baoya) (profile, financial position, leading products, R&D, distribution of production bases, technical features, etc.)

LSEV Expansion Projects of Some Manufacturers in China, 2016-2017

Maker	Project	Predicted Operation	Main Product	New Capacity Forecast
YUDEA	Shijiazhuang Base	Mar 2017, already in operation	LSEV	100,000 units
LEVDEO	Phase II Project	Aug 2016, already in operation	LSEV	200,000 units
BAOYA	Xiangyang Project	May 2017, not yet in operation	HSEV, LSEV	Phase I: 200,000 units Phase II: 300,000 units
DOJO	Gaoyou Base	May 2017, already in operation	LSEV	120,000 units
YOGOMO	Wuxi NEV Project	Jun 2017	LSEV	150,000 units
	Mengzhou Base	Undecided	LSEV	150,000 units
	Qinghe Phase III	Dec 2018	LSEV	150,000 units

Source: China Low-speed Electric Vehicle (LSEV) Industry Report, 2017-2021

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