

**Shared Mobility Industry Research--
Autonomous Driving Leads
Shared Mobility 3.0**

May 2020

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

The global shared mobility industry is experiencing a hard time. It is since 2019 that shared mobility enterprises have been exposed to financial fragility and have closed down one after another amid a nosedive in financing amount and rounds. The COVID-19 pandemic makes things worse. Shared mobility companies such as Uber and Lyft have cut jobs, while many automakers and Robotaxi companies have dabbled in the shared mobility market.

Tan Yi from GoFun believes that Shared Mobility 1.0 refers to the current public transit system, 2.0 means the new formats -- ride-hailing and timeshare rental occurring now, and 3.0 represents the application of autonomous driving in the future.

Shared mobility is closely related to autonomous driving. It is difficult for both of them to make money at this stage.

By 2030, the global Robotaxi fleet market will be worth at least US\$2 trillion annually, 12% of new cars will be sold to Robotaxi fleets globally, and 26 million Robotaxis will be in operation, as estimated by UBS Evidence Lab.

To have a bite of the future shared mobility market, the giants have offered subsidies to squeeze small and medium-sized mobility firms. Only the full exertion of autonomous driving can make the shared mobility market scale up, but the current immature autonomous driving technology, regulations and business models makes the goal impossible.

The shared mobility market is the battlefield of vibrant players who still need fight in alliance. WAYMO has tested Robotaxi for ten years. BMW has been groping for shared mobility business for almost a decade, but it eventually allied with Daimler to push on deeper cooperation on autonomous driving and shared mobility.

BMW's Mobility Development Course

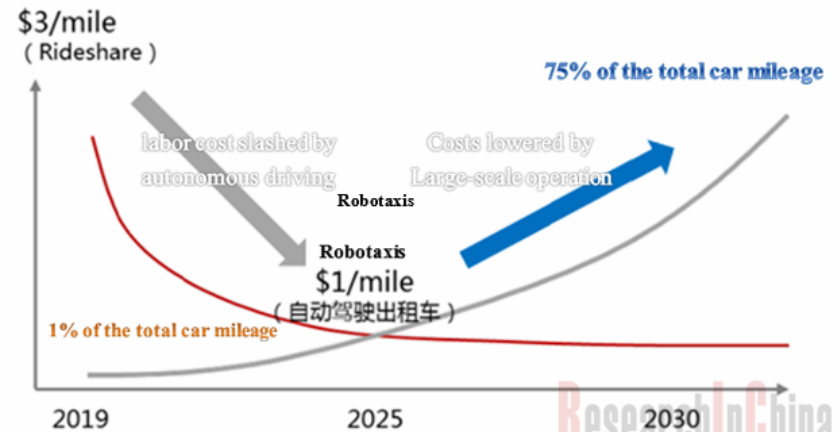


Source: BMW

www.researchinchina.com

A study by General Motors shows that the cost of shared mobility will be slashed from \$ 3 / mile to \$1 / mile through autonomous driving by 2025, thereby diluting the operation cost through a large scale. After 2030, the mobility mileage of Robotaxis will constitute 75% of the total.

Robotaxi Popularization Roadmap



Source: General Motors

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That is to say, autonomous driving will not give much impetus to shared mobility until 2025. From now on, it is a challenge for ambitious companies to make a layout in just five years. Looking back at the players' Robotaxi trials in 2019, we can see that fiercer rivalry is under way.

Trial Operation of Robotaxi

Three major forces are competing for the Robotaxi market, including:

(1) Didi, Uber, Lyft and other mobility platforms;

(2) Waymo, Aptiv, Baidu, Pony.ai and other Robotaxi solution providers;

(3) OEMs. Tesla plans to launch a Robotaxi network involving over a million Robotaxis on the road. Waymo has secured US\$3 billion in financing for enlarging the Robotaxi test fleet. Baidu announced in April 2020 the availability of China's first Robotaxi services which are being offered on mobile apps to the public.

Global and Chinese Key Robotaxi Projects

Projects	Enterprises	Test Sites
Aptiv-Lyft Robotaxi Services	Aptiv, Lyft	Las Vegas
Waymo One Robotaxi Project	Waymo	25 cities in the U.S.
Bosch-Daimler Robotaxi Test	Bosch, Daimler	San Jose, California
Hyundai-Pony.ai Autonomous Driving Services	Hyundai, Via, Pony.ai	Irvine, California
Cruise Autonomous Driving Test	GM Cruise	Downtown San Francisco (main); Scottsdale, Arizona; Warren, Michigan
Tesla Robotaxi Sharing Services	Tesla	Not clear
Argo AI Autonomous Driving Test	Argo AI, Ford, Volkswagen	Pittsburgh, Palo Alto, Miami, Washington, Detroit
Russia Yandex Robotaxi Test	Yandex, Hyundai Mobis	Innopolis, Skolkovo
Didi Robotaxi	Didi	Shanghai
Baidu-Hongqi Robotaxi	Baidu, FAW	Changsha, Hunan; Cangzhou, Hebei
WeRide RoboTaxi tests services in Huangpu District and Guangzhou Development Zone	WeRide RoboTaxi; Baiyun Taxi Group	Guangzhou
AutoX-FCA Robotaxi PacificaX	AutoX, FCA	Shenzhen

Source: ResearchInChina

Although a few giants and top Robotaxi startups are making long-term plans, it is still too early for most automakers, most of which have launched their own mobility service brands successively and made attempts in the lucrative but fiercely contested mobility market.

Shared Mobility Layout of OEMs

Mobility Brand	Established	Headquarters	Main Business	Parent Company
DriveNow	2011	Berlin, Germany	Timeshare Rental	BMW
Car2go	2012	Germany	Timeshare Rental	Daimler
Free2Move	Sept 2016	France	Ride-hailing	PSA
Fengju Mobility	Sept 2019	Beijing	Car Sale, Ride-hailing	Toyota +Didi Chuxing
Toyota Hainan Mobility	Nov 2019	Hainan, China	Car Rental, etc.	Toyota
Mobility Asia	Jul 2018	Hangzhou, Zhejiang	Ride-hailing	Volkswagen (China)+FAW
Juzhong Automotive Technology	Dec 2018	Shanghai	Ride-hailing	Volkswagen +Didi Chuxing
CAO CAO	May 2015	Hangzhou, Zhejiang	Ride-hailing	Geely
StarRides	Dec 2019	Hangzhou, Zhejiang	Ride-hailing	Geely +Daimler
Global Car Sharing EVCARD	May 16, 2016	Jiading District, Shanghai	Timeshare Rental	SAIC; Shanghai International Automobile City
BAIC Mobility	Feb 7, 2017	Beijing	Timeshare Rental	BAIC
FAW Mobility	Jul 25, 2018	Tianjin	Ride-hailing, Timeshare Rental	FAW
T3Mobility	Apr 22, 2019	Nanjing		FAW +Dongfeng +Changan
OnTime	Mar 29, 2018	Guangzhou	Timeshare Rental, Ride-hailing	GAC
Dongfeng Mobility	Jan 25, 2019	Wuhan	Ride-hailing, Timeshare Rental	Dongfeng Motor
Changan Travel	May 2017	Chongqing	Ride-hailing	Changan Automobile
Hexing Yueche	Jan 2019	Hefei	Ride-hailing	JAC
OLE Sharing	2017	Beijing	Timeshare Rental +Ride-hailing + Long and Short Rent	Great Wall Motor
GETnGO	Sept 2017	Shanghai	Timeshare Rental	WM Motor
Youpeng Mobility	May 2019	Guangzhou	Ride-hailing	XPENG Motors
PANDAUTO	Nov 2015	Chongqing	Timeshare Rental	Lifan Automobile

Source: ResearchInChina

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