

Next Generation Mobility in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a study on the domestic next generation mobility with the following conditions:

1. Research period: From October 2016 to March 2017
2. Research targets: Next generation mobility makers, related service providers, and etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, survey via telephone/email, and literature search

What is Next Generation Mobility?

Next generation mobility in this research indicates electric trikes (electric mopeds with a sidecar), electric minicars (four-wheeled cars with motors), and two-seater compact EVs (those corresponding to ultra-compact mobility certification not included.)

Note that the forecast of the domestic number of such vehicles sold has been calculated on the assumption that Ministry of Land, Infrastructure and Transport standardizes compact, two-seater EVs and other next generation mobility by 2020.

◆ Key Findings

■ Domestic Number of Next Generation Mobility (Electric Trikes, Electric Minicars, Compact Two-Seater EVs) Sold in 2016 Estimated as 1,100 (Vehicles Correspond to Ultra-Compact Mobility Certification System Not Included)

The domestic number of next generation mobility (electric trikes, electric minicars, and compact, two-seater EVs) sold in 2016 is estimated as 1,100, most of which are electric minicars (those corresponding to ultra-compact mobility certification not included.) The next generation mobility sold in Japan is currently consisted of only electric trikes and electric minicars. Therefore, current number of vehicles sold is regarded as restrictive.

Since there are only limited makers entered either in the markets of electric trikes and minicars, establishing guidelines of vehicle standardization is important for the next generation mobility market to expand, leading to standardize (commercialize) compact, two-seater EVs.

■ If Compact, Two-Seater EVs Being Standardized by 2020, Domestic Sales Expected to Expand to 5,300 Vehicles by 2020, and 8,000 by 2025

When assuming that compact, two-seater EVs are to be standardized (commercialized) by 2020, the domestic number of next generation mobility (electric trikes, electric minicars, and compact, two-seater EVs) sold should expand to 5,300 by 2020 and 8,000 by 2025. Considering that compact, two-seater EVs occupy only 0.3 to 0.4% of new cars sold in the market of similar vehicles (L class vehicles) in Europe, where they have a long vehicle standardization history, it is almost unlikely for the market to expand all of a sudden. There is full of promise for the market to expand if new demands are to be explored, still, rapid increase of compact, two-seater EVs right after the standardization is hardly conceivable. The market should grow gradually.

◆ Report Format

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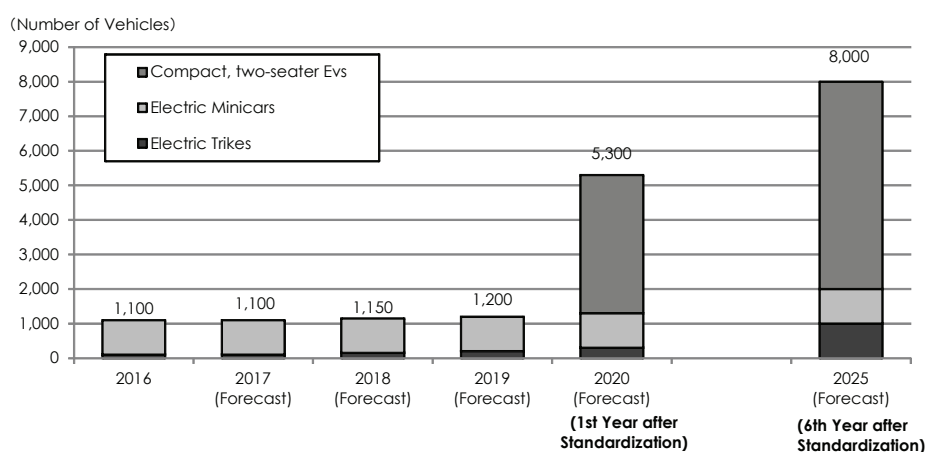
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Format: 174 pages in A4 format

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■ Figure & Table 1: Forecast of Domestic Number of Next Generation Mobility Sold



Estimated by Yano Research Institute

	Unit	Before Standardization				Standardization 1st Year	Standardization 6th Year
		2016	2017 (Forecast)	2018 (Forecast)	2019 (Forecast)	2020 (Forecast)	2025 (Forecast)
Electric Trikes	(Number of Vehicles)	100	100	150	200	300	1,000
Electric Minicars	(Number of Vehicles)	1,000	1,000	1,000	1,000	1,000	1,000
Compact, two-seater	(Number of Vehicles)	0	0	0	0	4,000	6,000
Domestic Number of Next Generation Mobility Sold (Total)	(Number of Vehicles)	1,100	1,100	1,150	1,200	5,300	8,000

Estimated by Yano Research Institute

Notes:

1. The market size is calculated based on the domestic numbers sold.
2. Next generation mobility in this research indicates electric trikes (electric mopeds with a sidecar), electric minicars (four-wheeled cars with motors), and two-seater compact EVs (those corresponding to ultra-compact mobility certification not included.) Note that the forecast of the domestic number of such vehicles sold has been calculated on the assumption that Ministry of Land, Infrastructure and Transport standardizes compact, two-seater EVs and other next generation mobility by 2020.