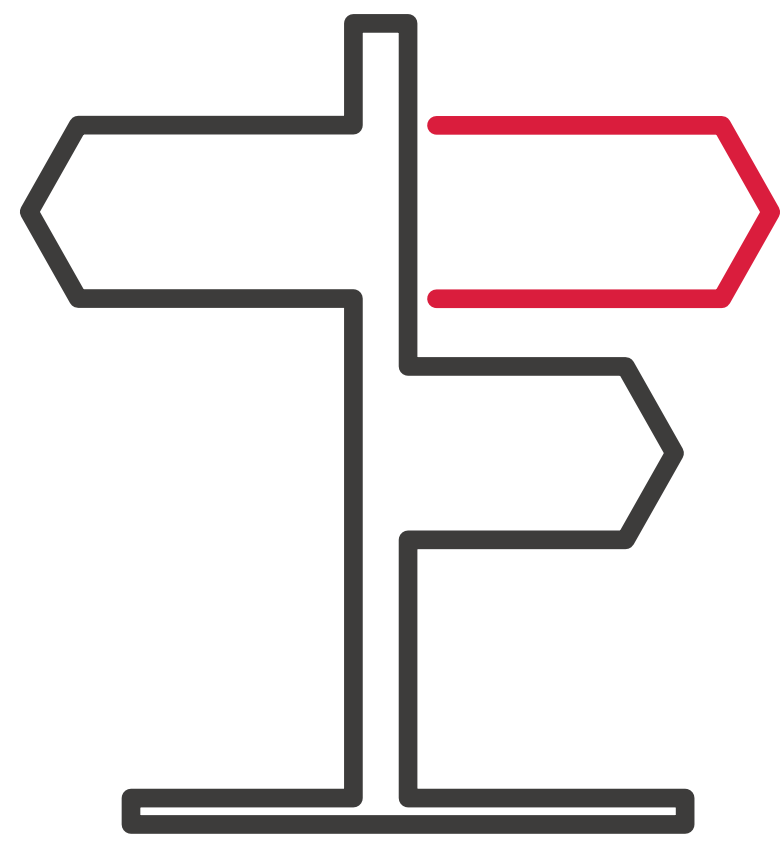


ELECTRIC MOPEDS:

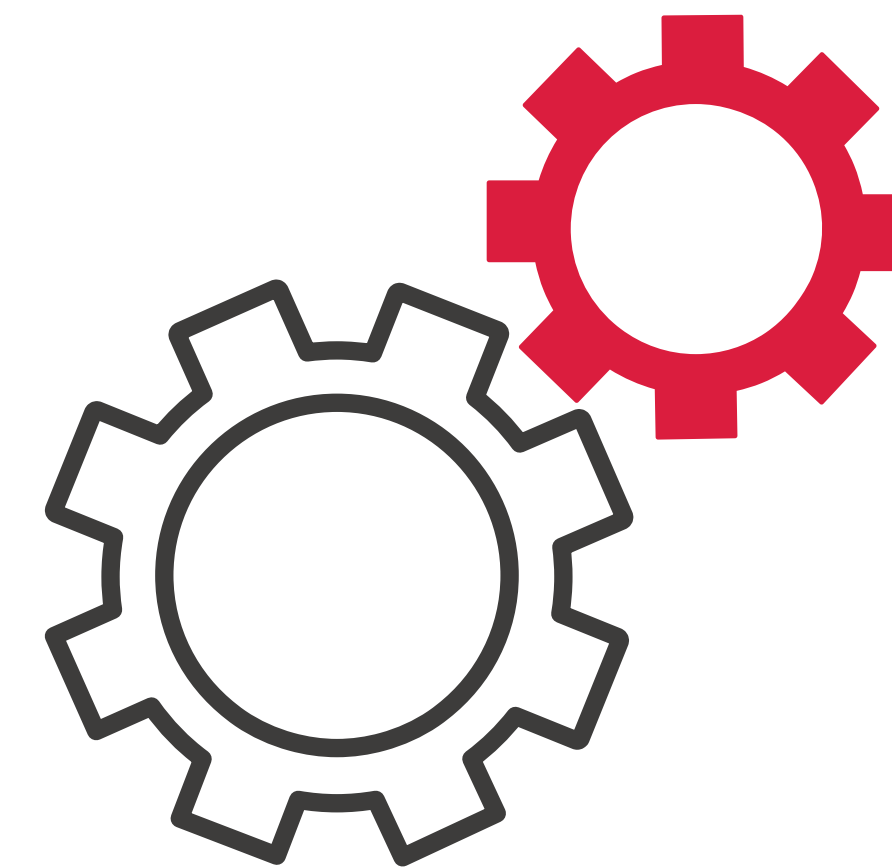
**SHARING OR OWNING -
WHAT WOULD YOU PREFER?**



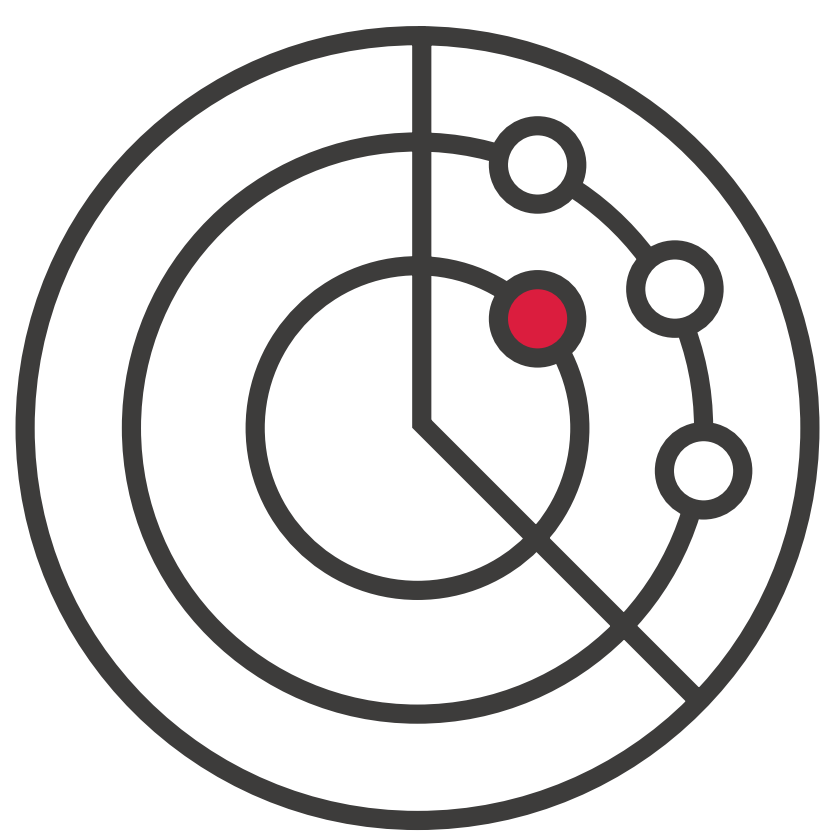
Understanding the e-moped market & customer requirements helps to evaluate ownership & sharing models



Which model (sharing or ownership) will drive future growth in the micromobility ecosystem?



What are typical specifications of e-mopeds available on the market today?



What pricing models are e-moped sharing providers using to position themselves alongside competitors?



What is the current state of the global e-moped market?

Moped sharing is part of the micro-mobility market, currently predicted to grow to € 280-480 million by 2030

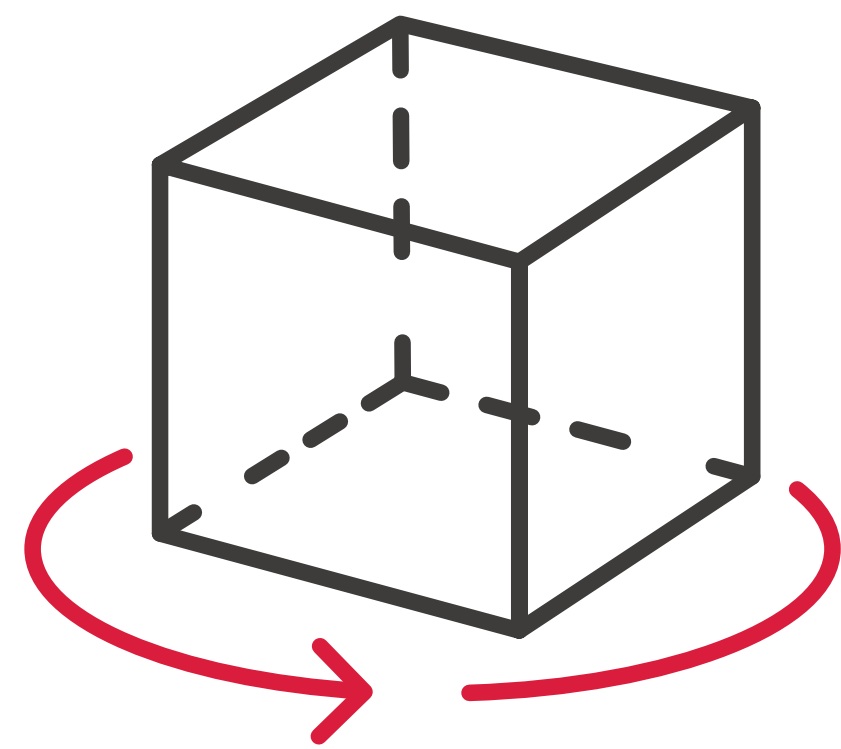
Benefits of e-mopeds



Link between shared scooters, bikes & cars with 2 riders & further, quicker travel



Affordable & low risk endeavor; profitability possible faster than for a shared car

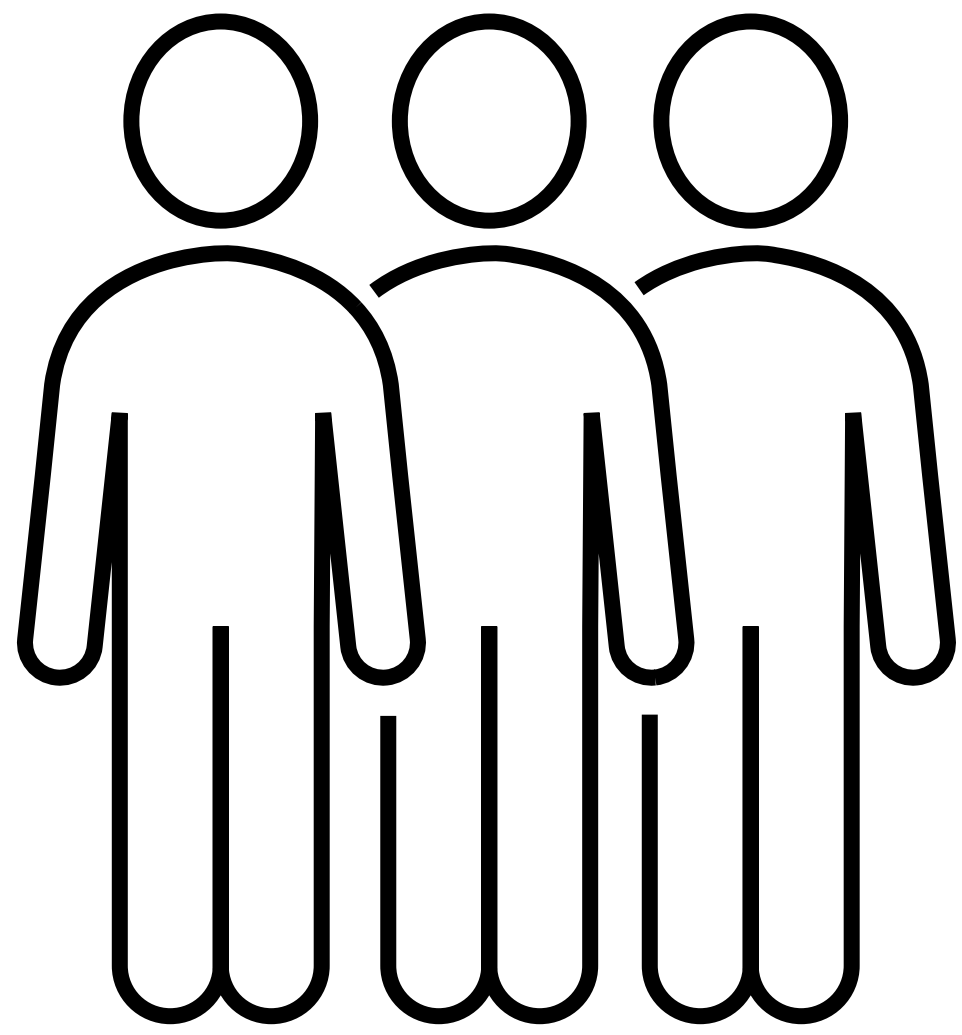


Compact & easy to use with little space required & high agility in traffic



Convenient & sustainable transport option (e-mopeds)

Moped sharing is part of the micro-mobility market, currently predicted to grow to € 280-480 million by 2030



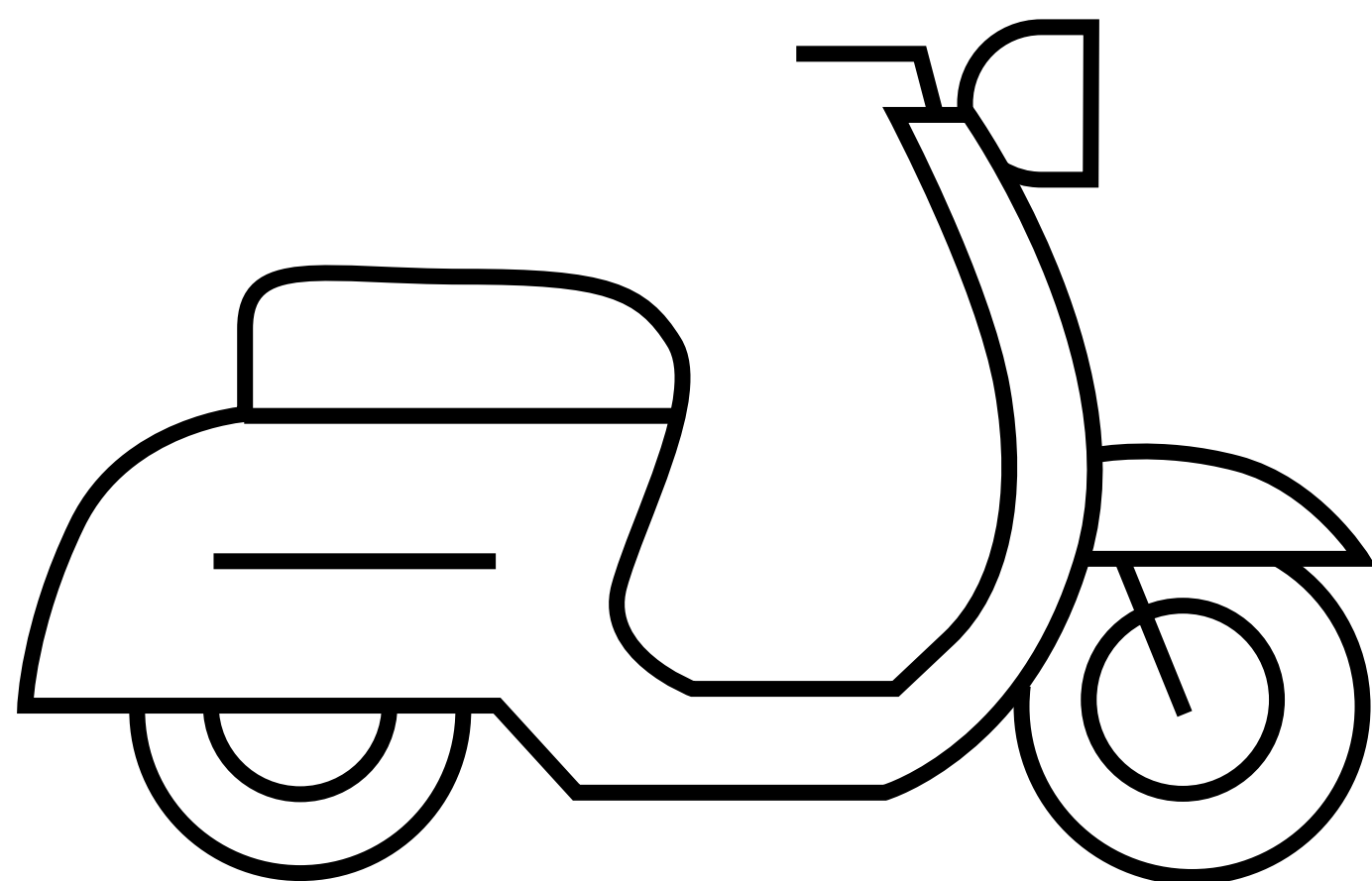
12 MILLION

RIDERS AND USERS



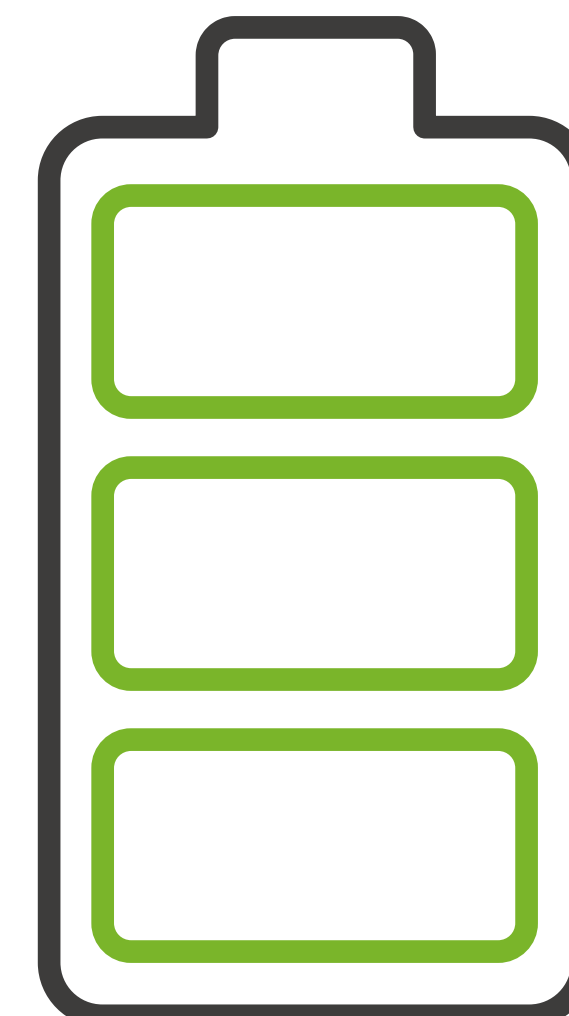
27

COUNTRIES
WORLDWIDE



110,000

SHARED MOPEDS



97%

ELECTRIFIED
MOPEDS



87

PLATFORM OPERATORS

Shared e-moped platform operators
offer pay-per-minute and bundled packages
that range in cost across providers

Shared E-moped Cost overview

Top USA operator

Cost to ride
€ 0.44-0.47/min

Cost to park
-

Day pass
720 min for ~€ 33.45

Minute packages
30 min for ~€ 11.50
60 min for ~€ 18.00

Top EU operator

Cost to ride
€ 0.22-0.24/min

Cost to park
€ 0.13/min

Day pass
500 min for € 14.99

Minute packages
150 min for € 30
300 min for € 57
600 min for € 108

Shared e-moped platform operators
offer pay-per-minute and bundled packages
that range in cost across providers

Shared E-moped Cost overview

Top Asia operator

Cost to ride
€ 0.06-0.08/min

Only pay
per minute

#1 Global operator

Cost to ride
€ 0.29/min

Cost to park
€ 0.15/min

Day pass
-

Minute packages
75 min for € 19.95
200 min for € 49.95
425 min for € 99.95

A comparison of key specifications and cost breakdowns gives a comprehensive overview of differences between three e-moped brands

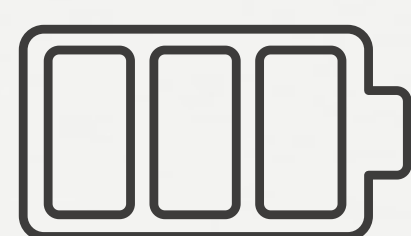
E-MOPED „VALUE TYPE“



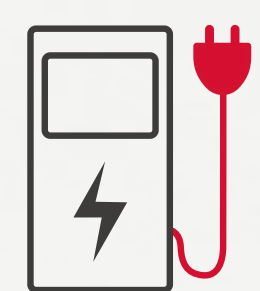
55 km



45 km/h



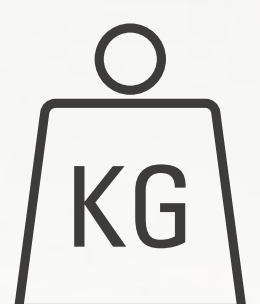
48 V – 31 Ah – 1.2 kWh



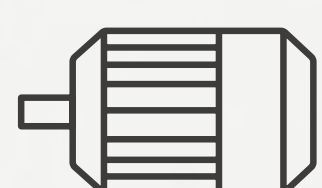
Dual charger to std. outlet



7 hours



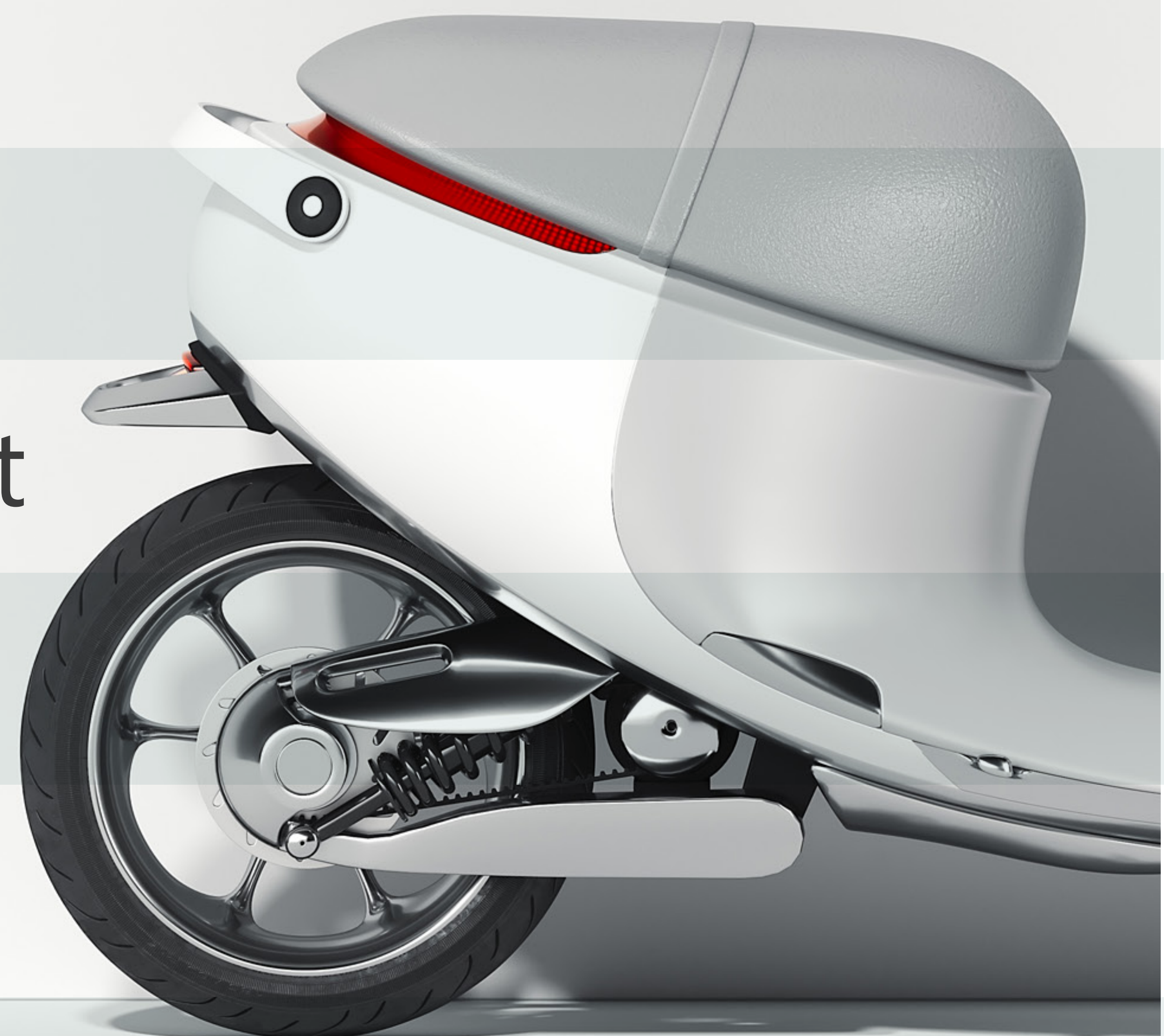
72 kg



Electric hub motor (1.2 kW)

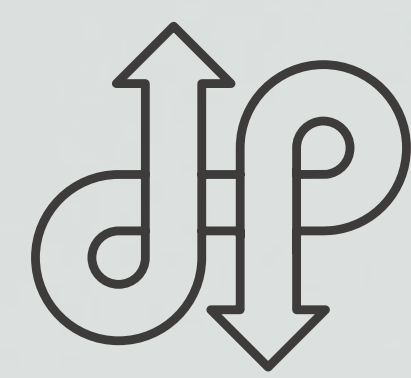


€ 2,399



A comparison of key specifications and cost breakdowns gives a comprehensive overview of differences between three e-moped brands

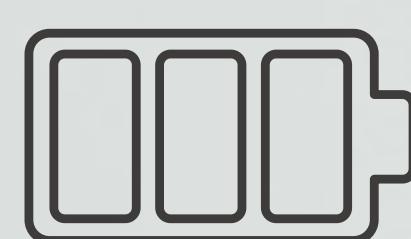
E-MOPEL „PREMIUM TYPE“



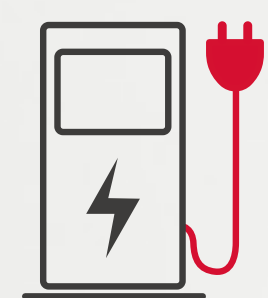
52 km



45 km/h



2.0 kW, lithium ion



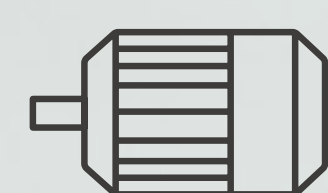
Battery w/caddy to std. outlet



3.5 hours



116 kg



Electric hub motor (1.6 kW)



€ 4,190

A comparison of key specifications and cost breakdowns gives a comprehensive overview of differences between three e-moped brands

Insights



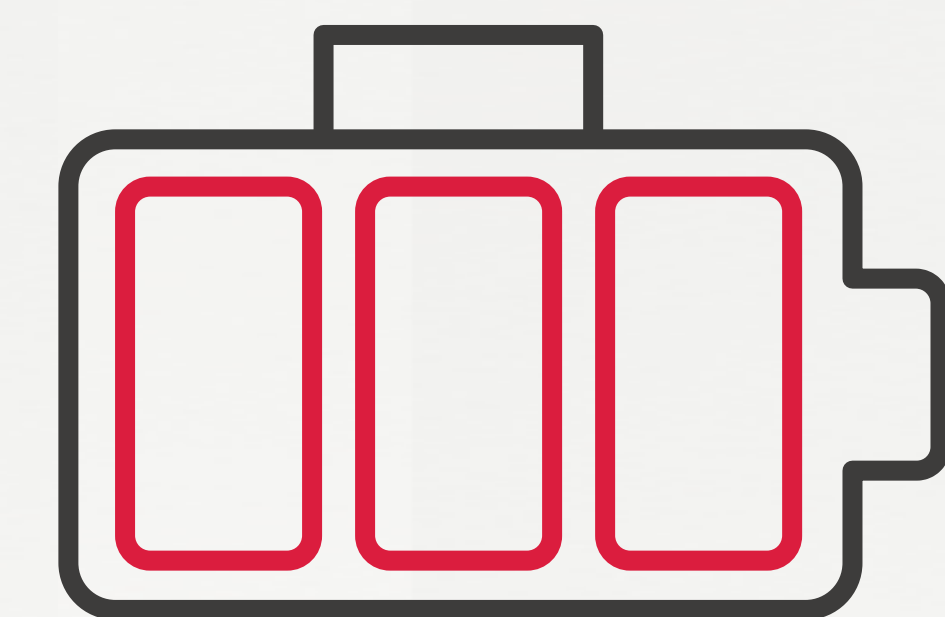
45 km/h class dominated by hub motors over belt drives



Two passenger use is standard



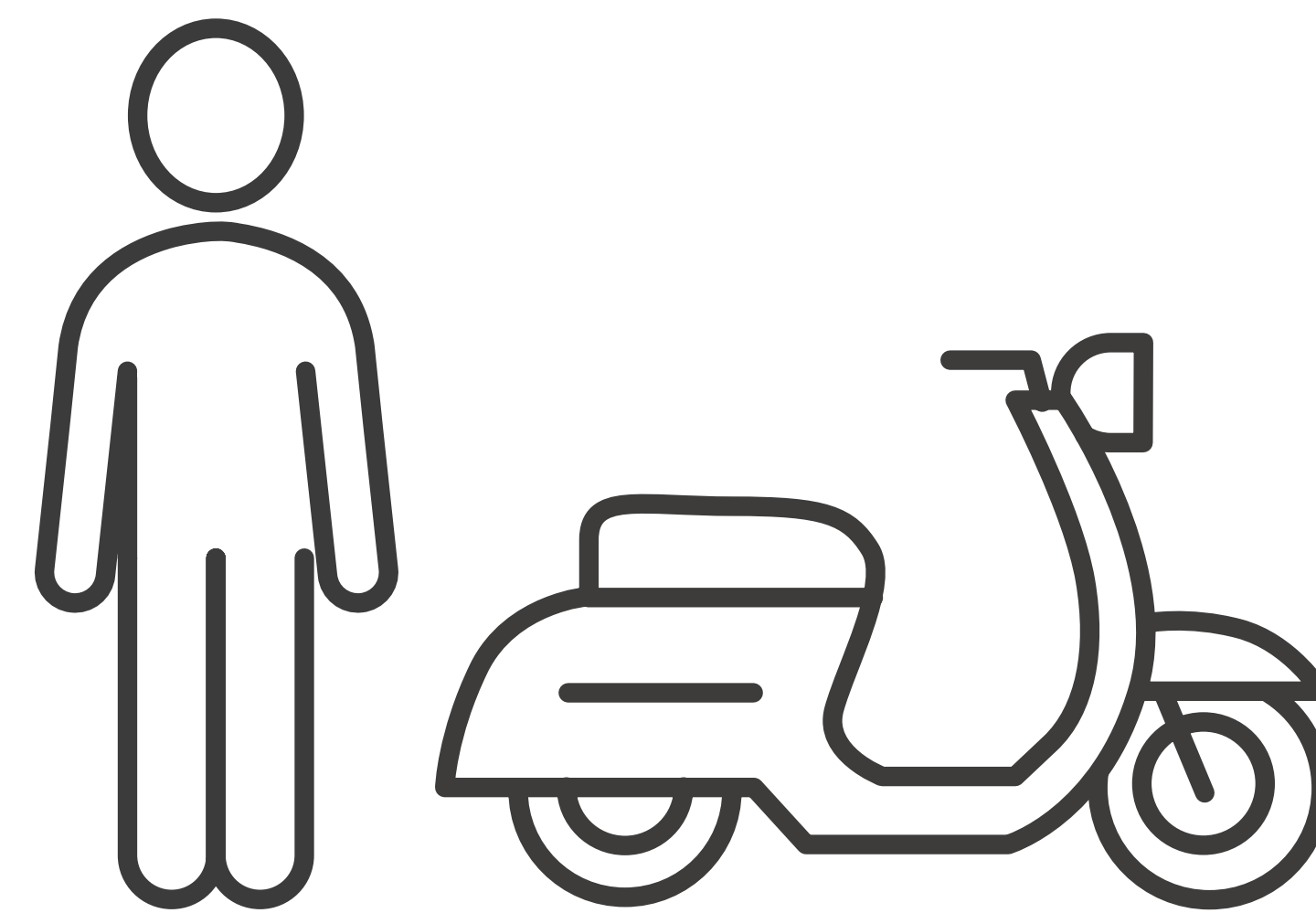
Complete connectivity via OEM-specific apps for localization, moped status & remote start



Batteries removable for docking station charge or chargeable from moped

Determining whether ownership or sharing is more favorable for e-moped users depends highly on customer usage behavior

OWNERSHIP



Owner responsible for multiple costs:
insurance, purchase price, maintenance costs, charging costs

COSTS

Constant availability:
only limited by previous parking location

FLEXIBILITY

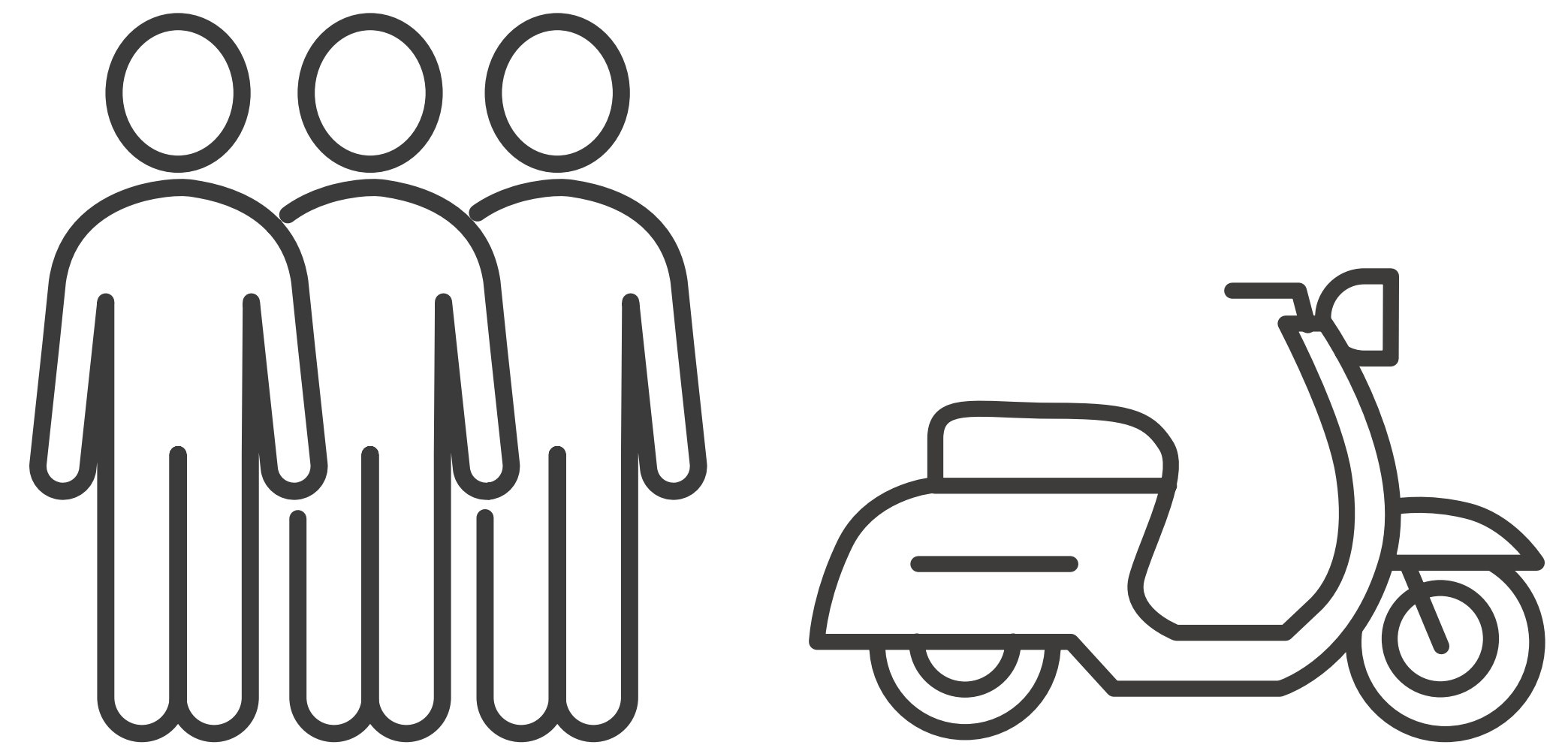
Additional features available:
rugged, all-weather design, robust wheels, visually appealing, connectivity

QUALITY OF
PRODUCT

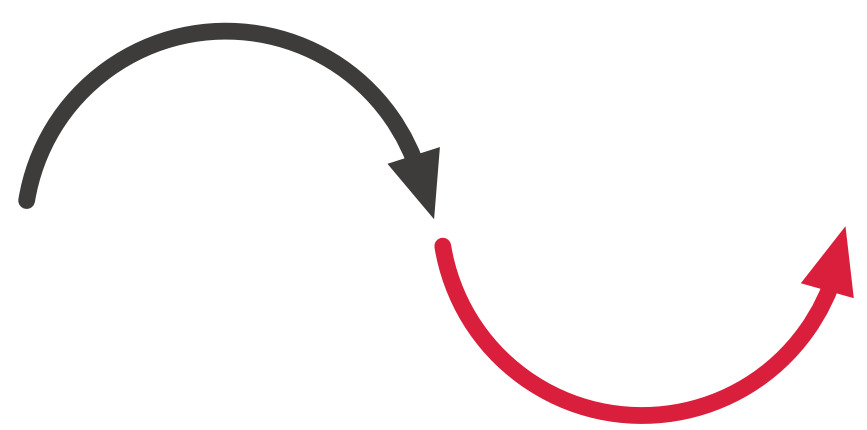
Determining whether ownership or sharing is more favorable for e-moped users depends highly on customer usage behavior



SHARING



Pay only for use:
payment to unlock, ride, & reserve



Flexible availability:
start & stop rides at different locations; limited by location & availability of shared mopeds



Limited functionality:
features are limited; failures prevent rides; not robust

FEV Consulting understands the challenges of the micromobility market and can support you in positioning your business for success

YOUR CHALLENGES

Market Pull



Market development



Customer needs

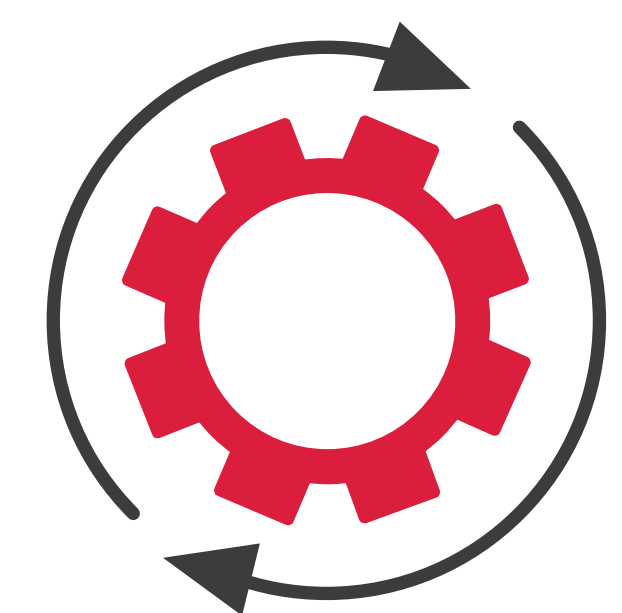
Technology Push



Competitors &
Substitutes



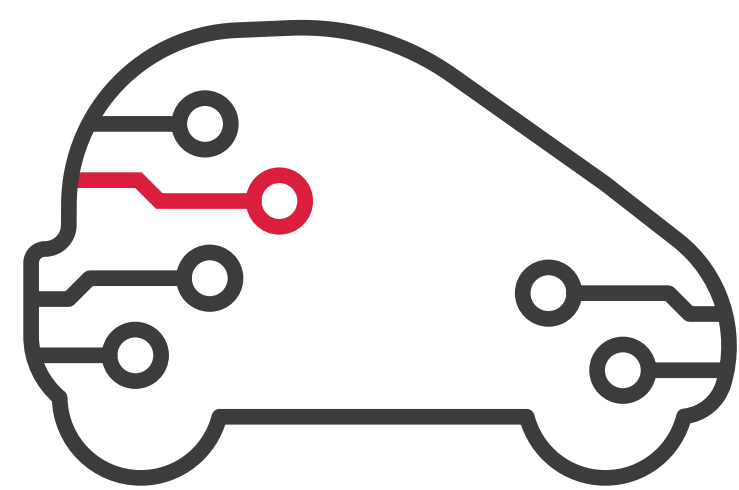
Connectivity &
digital services



Solutions &
Trends

FEV Consulting understands the challenges of the micromobility market and can support you in positioning your business for success

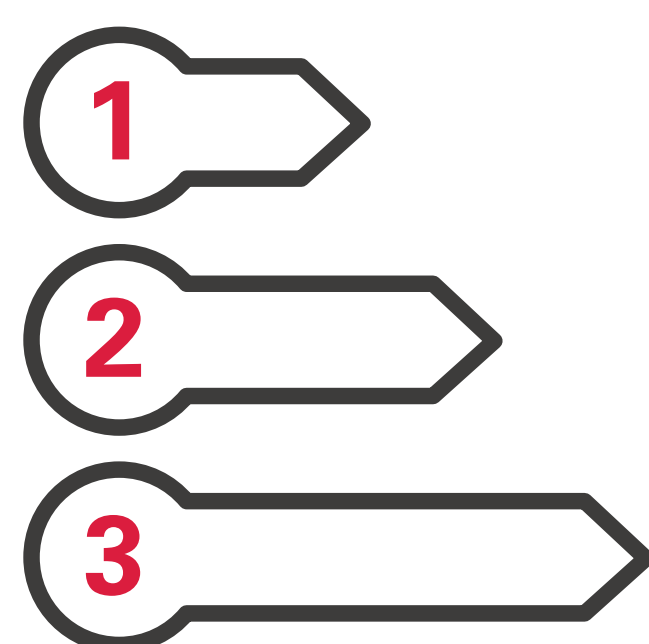
OUR SOLUTIONS



Strategic & technological advice



Analysis of market environment & business model generation



Supply chain analysis & technology roadmap creation

INTERESTED?
GET IN TOUCH WITH US!



DR. MICHAEL WITTLER

DIRECTOR



RILEY PADOVANO

CONSULTANT