

Taipei Cycle Show 2005

USA LEV Market – High Price /
High Service / High Performance

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美國輕便電動車市場一覽

高價位-高性能-優質服務

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Strong Sales at Highest and Lowest Prices

- LEV products are new to most USA consumers. They do not know how to evaluate them or make judgments about the suitability of this product for their purpose or the value for their money.
- The consumer uses price as a determining point for their selection. The LEV product must either be cheap enough to discard if it is not satisfactory, or high performance and high quality and thus deserving of a high price.

高價位和低價位旺銷

- 輕便電動車對大多數美國消費者來說還是十分陌生的，他們還不太清楚該怎樣評估這類產品，也不知道該怎樣判斷這些產品是否符合他們的需要，或者說值得花這筆錢
- 消費者用價格作為他們選擇的標準，輕便電動車的價格必須低到消費者如果不滿意的話可以棄之不用，如果高價位的話，則必須要有高性能和高質量做保證

Pricing

- Example of low end price points:

Target selling Chinese electric bikes for \$399.00 – cheap enough for most USA consumers to be willing to discard it if not satisfactory.

- Example of high end price points:

Tidal Force bikes \$2500 – 3300.00 – high performance, high quality.

價格

- 低價位產品的一些例子：
中國制造的電動自行車目標價格為399.00 美元，價格低廉，大多數的美國消費者如果對產品不滿意的話，可以棄之不用
- 高價位產品的一些例子：
浪峰公司的潮力牌Tidal Force自行車定價在2500 - 3300美元之間，屬於高性能，高質量產品

USA Law Allows More Power Than Most Products Provide.

- USA law allows 750 watts, 20 mph maximums when combined with functional pedals = legally defined as a bicycle.
- More powerful products can be homologated as “motor driven bicycles”, “mopeds” or “motorcycles.”
- Most Asian makers are providing 250 watt vehicles.

美國法律規定的電動自行車所配功率超過大多數產品所提供的功率

- 美國的法律規定，配備有腳踏板的電動自行車，最大允許功率為750瓦, 20毫安
- 配備有更大功率的產品可以歸類為“電動自行車”“電動腳踏車”，或者“摩托車”
- 大多數的亞洲廠商提供250瓦的產品

USA Consumer is Larger and Needs the Extra Power

- Majority of current USA consumers are Caucasian, with males averaging more than 150 lbs, many weighing more than 200 lbs.
- The larger the consumer, the more likely they are to be attracted to LEV products.
- Most Asian products do not have strong enough frames, wheels, and other components for this size rider.

美國消費者體格高大需要更大功率

- 大多數的美國消費者是白人，白人男性平均體重超過150磅，許多人體重甚至超過200磅
- 消費者的體格越大，他們越喜歡輕便電動車產品
- 大多數的亞洲產品都沒有為這類消費者提供足夠牢固的鋼叉，輪子和其他部件

Dealer Service, Assembly and Support Necessary

- Assembly is required by most consumers.
- Nature of these products require trained assembly technicians.
- Phone support not enough
- Dealer training a key issue
- Parts and tool availability necessary
- Communication with factory and continues improvement necessary.

經銷商服務，產品組裝和必要的售後服務

- 大多數的消費者會要求組裝服務
- 此類產品需要經過專門訓練的技術員來組裝
- 僅有電話支持是不夠的
- 經銷商的培訓是一個關鍵
- 零部件和必要的工具應該容易取得
- 同廠家保持聯絡以便改進產品質量

After Sales Service is a Key Issue to USA Consumer

- USA consumers expect products to work nearly perfectly “out of the box” and to require no repair or adjustment.
- When a product fails to achieve such a standard, the consumer expects quick and expert after sales service.
- The size of the USA, and the confused nature of the distribution network makes it difficult to provide good after sales service.

對美國的消費者來說售後服務是一個關鍵

- 美國的消費者通常預期新的產品使用起來近乎完美，不需要修理或調整
- 當產品不能做到這一點時，消費者就會寄希望於快速和專家型的售後服務
- 美國面積之大，銷售網絡的複雜性使得提供優質的售後服務非常困難

Channels of Distribution are Still Confused and Diverse

- LEVs are sold by mass merchants, internet merchants, catalog merchants, bicycle shops, motor sports dealers, and many other distributors.
- No single channel has yet emerged as the dominant distribution method for LEVs.
- Consumers do not know where to go for information, test rides, sales and service.

銷售網絡的復雜性和多樣性

- 輕便電動車通過這些商家出售：大商場，網絡經銷商，郵購商，自行車商店，摩托體育運動器械店等
- 上述這些經銷渠道，還沒有一家對經銷輕便電動車佔據控制地位
- 消費者無法輕易得到有關自行車的銷售和服務等信息，也不知道哪裡可以試騎

Homologation Issues Are Being Ignored by Many Product Makers

- Electric bicycles are “bicycles” and must meet the Consumer Product Safety Commission requirements for “bicycles”.
- Most “off the shelf” electric bikes from China do not meet these requirements.
- This will result in recalls and lawsuits in the near future.
- There will be products stopped at customs as a result of this practice.

許多制造商忽視產品的安全性問題

- 電動自行車是自行車，必須符合消費品安全委員會關於自行車的有關規定
- 大多數貨架上中國制造的電動自行車都不符合這些規定
- 在不遠的將來，這可能導致返修和法律糾紛
- 對安全性的長期忽視有可能導致海關扣押某些產品

Role of CPSC

- Consumer Product Safety Commission (CPSC) is a federal government agency with the responsibility of ensuring that products sold to USA consumers are safe for their intended use.
- This is accomplished by a combination of standards, tracking of injuries, consumer and manufacturer / distributor self reporting, and recalls.
- The CPSC has the ability to levy multi million dollar fines and to require the recall of all products sold if the CPSC decides that a product is unsafe.

消費品安全委員會的職責

- 消費品安全委員會是美國聯邦政府的一個機構。它的職能是保證在美國出售的消費品的安全性
- 消費品安全委員會通過以下的手段來執行它的職能：建立標準，消費品傷害的跟蹤，消費者，生產廠家或銷售商的自我報告，以及返修的統計
- 消費品安全委員會有權對它認為不安全的產品實施數百萬美元的罰款，已及返修所有已出售的產品

Role of DOT

- The Department of Transportation is a federal government agency that is responsible for nearly all forms of vehicles other than bicycles.
- DOT has standards for motor cycles, mopeds, and other vehicles that must be met for vehicles to be distributed in the USA.
- Most Electric Bike makers have no need to interact with DOT.

聯邦交通部的職能

- 聯邦交通部是美國聯邦政府的一個機構，它負責監管除自行車以外的所有交通工具
- 在美國出售的交通工具必須符合聯邦交通部有關摩托車，機動腳踏兩用車，或者其他車輛的有關標準
- 大多數的電動自行車制造商並不需要同聯邦交通部打交道

Enforcement Mechanisms

- CPSC and DOT can prevent the importation of non-conforming goods at customs.
- CPSC and DOT can require the recall of dangerous goods.
- CPSC and DOT can impose large fines.
- DOT can withdraw the certification of a manufacturer or a dealer.

實施機制

- 消費品安全委員會和聯邦交通部可以防止不符合標準的產品從海關流入
- 消費品安全委員會和聯邦交通部可以要求對有危害的產品實施返修
- 消費品安全委員會和聯邦交通部可以實施巨額罰款
- 聯邦交通部可以撤回發給制造商或經銷商的許可証

Product Liability Lawsuits are Also an Enforcement Mechanism

- The government agencies are slow to react to problems.
- Government agencies are normally understaffed and have far too many issues to investigate and prosecute.
- Lawsuits are easy, quick, and profitable to the plaintiff in many cases – a larger and more immediate “enforcement” mechanism.

產品質量法律訴訟也是實施機制之一

- 政府機構對產品的糾紛正通常反應比較緩慢
- 政府機構通常缺少人手，等待調查和處理的問題又很多
- 法律訴訟非常容易，速度快，在很多情況下對原告來講利潤豐厚 - 這是一條快速有效的實施機制

Product Liability

- USA law provides for anyone to sue anyone for any reason.
- Lawyers in the USA will accept the work of creating a lawsuit on a contingency basis. “If you win the lawsuit, we get paid. If not- our work is free to the plaintiff” is a popular marketing ploy for lawyers in the USA.
- The result is that most consumer product companies are being sued most of the time.

產品質量責任

- 美國的法律容許任何人以任何理由起訴任何人
- 美國的律師願意接受成功酬金形式的訴訟案件：如果你贏了官司，就付我們報酬。如果你沒有贏，原告就不用付我們酬金 - 這是美國律師的一個普遍營銷策略
- 這樣的結果是大多數的產品公司大多數的時候官司纏身

Product Liability Theory

- Product liability theory provides that a manufacturer / distributor has a duty to provide goods that are suitable for the purpose they are used for, safely constructed and to warn the user of potential dangers.
- Failure to do all of these can result in a successful product liability lawsuit that can cost millions of dollars for seemingly trivial incidents.

產品質量責任理論

- 產品質量責任理論：生產廠家和經銷商有責任提供在相應範圍內使用的產品的安全性，並提供潛在的危害警告
- 不符合以上標準的產品就有可能導致產品質量責任的訴訟，看起來輕微的事故都可能花費數百萬元

The Plaintiff Does Not Need to be Correct!

- Many lawsuits in the USA are decided by juries who may make their decision based on sympathy for the victim or anger at the defendant rather than the merits of the case.
- Judgments can cause all of the assets and inventory of a manufacturer or distributor that can be reached by the American legal system to be seized.

起訴方不一定要絕對正確！

- 美國的很多官司最後是由陪審團來裁定的。陪審團有可能基於對受害者的同情，或者對被告的憤恨，而不是對案件的合理性來作出判決
- 最後的判決有可能導致美國的司法體系能夠管轄範圍內的生產廠家或經銷商所有的資產被沒收

Insurance is Required

- The best defense for an Asian manufacturer is to have appropriate insurance. But it is not enough.
- Warning labels, owner's manual, a responsible distribution partner, and a good plan for handling complaints are also required.
- Most distributors will require insurance from the makers of the products.

購買保險絕對必要

- 亞洲製造商的最好防護辦法是購買合適的保險，但僅有保險是不夠的
- 警告標記，用戶手冊，負責任的經銷伙伴，和一個有效的處理抱怨的計劃，這些都是必須的
- 大多數的經銷商會要求制造商有保險

Vehicles Must be Adapted to USA Sizes and Shapes.

- USA consumers are taller and expect their LEVs to fit them comfortably.
- Most “off the shelf” Asian products are too short vertically and horizontally for the USA consumer.
- Most Asian designs are not regarded as fashionable by the USA consumer.
- USA consumers ask for different colors.

車輛必須適合美國的尺寸和形狀

- 美國的消費者高大，希望輕便電動車坐著舒適
- 大多數的未經改裝的亞洲產品在縱橫向上對美國消費者來講都太短
- 大多數的亞洲產品設計對美國消費者來講都不夠時髦
- 美國的消費者希望有不同顏色的選擇

Characteristics of Mass Market Distribution

- Mass Market distribution is usually successful with the lowest price goods. So far, every effort to sell higher priced, high performance goods through mass merchants has failed.
- Mass market has high return rates, high consumer liability complaints, and minimal margin for the maker and importers.
- Large insurance policies are required, and credit is often demanded by the retailer from the suppliers.
- Retailer margins can be very low.

大眾市場營銷的特點

- 大眾市場營銷通常對低價位的產品比較成功，迄今為止所有試圖通過大眾市場營銷高價位，高品質產品的努力都以失敗告終
- 大眾市場營銷顧客退貨率高，顧客對有關產品質量的投訴率較高，生產商和進口商的利潤率則較低
- 零售商的利潤率更低

Characteristics of Independent Retailer Distribution

- Independent retailers are most successful with higher quality, higher price goods.
- Volume of sales is much lower than mass merchants. Communications costs and complexity is much higher between retailer and distributor / manufacturer.
- Insurance is required. Training is required.
- Lawsuits are fewer.
- Retailer margins normally more than 30%

獨立零售商的特點

- 獨立零售商對於高質量，高價位的產品銷售比較成功
- 獨立零售商銷售額比大眾市場營銷要低很多，零售商與經銷商或者生產商之間的交流成本和復雜程度要高很多
- 購買保險和提供培訓都是必須的
- 法律訴訟會少很多
- 零售商的利潤率一般在30%以上

More Reliance on Internet

- LEVs are “high information products.” This means that the consumer needs a lot of information before they can make a good buying decision.
- Often the primary source of such information is the Internet.
- However, relatively few sales are made on the basis of internet alone.

更多的依賴英特網

- 輕便電動自行車是“高信息產品”，這就意味著消費者在作購買決定以前會需要很多信息
- 通常最基本的信息來源就是英特網
- 可是，很少的銷售是僅僅通過英特網來實現的

Test Rides still Necessary

- The key experience for sales of all LEV products is the test ride event.
- A safe, appropriate place to test ride correctly assembled and correctly functioning LEVs is necessary.
- Mass merchants usually cannot provide this.
- Independent retailers usually do provide this.

試騎還是很必要的

- 試騎對輕便電動車的銷售至關重要
- 有一個合適的地點去試騎一輛安全的，正確組裝，各項功能發揮正常的輕便電動車是非常重要的
- 大眾市場營銷通常不能做到這一點
- 獨立零售商通常能夠做到這一點

Owner's manuals, Dealer Manuals, Service Manuals Necessary

- Owner's manuals are both instruction books and warnings on safety.
- Dealer manuals need to cover how to sell, and how to operate the vehicles.
- Service manuals need to address almost all service issues.
- All of these must be in fluent English with generous and appropriate illustrations.
- The books must be attractive and easy to read.
- Lack of such books can lead to product liability lawsuits.

用戶手冊，經銷商手冊，服務手冊 都是必須的

- 用戶手冊既是用的使用指南，也提供注意安全的忠告
- 經銷商手冊需要包括怎樣銷售，怎樣使用車輛的資料
- 服務手冊需要包括幾乎所有的服務方面的信息
- 所有這些都必須以流利的英語，配有充分合適的圖例
- 手冊應該容易閱讀
- 缺少這些資料可能導致產品質量責任訴訟

USA Market is Not Easy, Not Large, and Full of Traps

- There have been no “one shot” successes in LEV sales in the USA.
- Most successful companies have slowly and carefully built dealer networks.
- The size of the USA alone makes this slow, expensive and laborious.
- Missing key issues like homologation, manuals, dealer training, etc. can result in lawsuits that can destroy a business.

美國市場困難重重，渠道有限，而且充滿了陷阱

- 輕便電動車在美國還沒有一炮打響的例子
- 大多數成功的公司都是逐步小心的建立自己的營銷渠道
- 美國地域寬廣，使建立營銷渠道這個過程非常緩慢，昂貴而費力
- 某一關鍵的缺失，譬如安全性，手冊，經銷商的培訓等等，所導致的法律訴訟可能毀掉整個生意

Companies Successfully Building Dealer Networks:

- WaveCrest Tidal Force brand of electric bikes. (supplied by Merida / MT Racing – Montague)
- Giant Bicycle Company
- eGo (Taiwanese supplier)
- EV Global (Supplied by Fairley Bicycle Co.)

All of these are premium priced products.

成功地建立的營銷渠道的公司

- 浪峰公司的潮力牌TidalForce電動自行車
（Merida/MT Racing Montague 供貨）
- Giant Bicycle公司
- eGo (台灣的供貨商)
- EV Global (Fairley Bicycle Co. 供貨)
- 所有這些都屬於優質標價的產品

Xie 51!

- Questions?
- This presentation will be posted at www.CycleElectric.com and www.wavecrestlabs.com within 2 weeks.
- Questions emailed to ed.benjamin@wavecrestlabs.com will be answered as best as I can and referred to other experts if appropriate.

謝謝大家

- 有問題請提問
- 本講演兩星期之內會加貼在以下網站：
- **www.CycleElectric.com and**
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