



# China Electric Vehicle Charging Station Market Report, 2011-2012

May 2012

## 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 NBS(National Bureau of Statistics of China), State Grid Corporation of China, and CAAM etc.

## Abstract

In March and April 2012, the Ministry of Science and Technology and the Ministry of Industry and Information Technology introduced two development plans for the electric vehicle industry which sketched the technology roadmap of Chinese electric vehicle industry and took the development of all-electric vehicle as the focus. As electric vehicle (EV) charging (battery-switching) stations mainly serve all-electric vehicles, the issuance of the aforesaid plans is obviously favorable for the development of EV charging (battery-switching) stations in China.

With regard to the construction of EV charging stations, China had built up 314 charging stations and more than 16,000 AC charging spots by the end of 2011. State Grid Corporation acted as the main player, and China Southern Power Grid and China Potevio also made some progress in the construction of charging facilities in Guangdong and Shenzhen. Presently, the construction of EV charging (battery-switching) stations is mainly concentrated in East China, South China and North China, because electric vehicles are promoted rapidly in these regions.

## Electric Vehicle Charging Facilities in China, 2011

	Charging Station	Charging Spot
State Grid Corporation	243	13,283
China Southern Power Grid	14	2,901
China Potevio	57	-
Total	314	16,184

Source: ResearchInChina

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This report starts with the demonstration & promotion policies, financial subsidy and development planning concerning EV industry to analyze the state quo and prospect of EV charging (battery-switching) stations in China and highlights the operation of charging station constructors like State Grid Corporation and China Southern Power Grid, as well as of the downstream charging equipment manufacturers such as NARI Technology Development Co., Ltd. and Shenzhen Auto Electric Power Plant Co., Ltd.

NARI Technology Development Co., Ltd. is one of the major beneficiary enterprises in the construction of EV charging station in China, and boasts comprehensive capabilities in providing such hardware products as EV charging station system integration, charger and charging spots. In 2011, the company occupied 70% of EV charging station system integration market of State Grid Corporation.

Shenzhen Auto Electric Power Plant Co., Ltd. is one of the major manufacturers of chargers and charging spots for EV charging stations in China, as well as one of the earliest listed companies entering EV charging equipment market. In 2011, the company participated in the construction of seven EV charging stations in Shenzhen and provided charging spots and chargers for Shenzhen Power Supply Bureau.

### **1. Profile of Electric Vehicle Charging Station**

#### 1.1 Electric Vehicle

##### 1.1.1 Definition

##### 1.1.2 Classification

#### 1.2 Electric Vehicle Charging Station

##### 1.2.1 Definition and Classification

##### 1.2.2 Charging Modes

##### 1.2.3 Charging Station Configuration

### **2. Policy Environment**

#### 2.1 Major Policies

#### 2.2 Financial Subsidy Policies

#### 2.3 Demonstration and Promotion Policies

#### 2.4 Industry Development Planning

##### 2.4.1 “12th Five-Year Plan” for Electric Vehicle

##### 2.4.2 Energy-saving and New Energy Vehicle Industry Development Plan

### **3. Development of Electric Vehicle Market in China**

#### 3.1 Market Scale

#### 3.2 Market Structure

### **4. Development of Electric Vehicle Charging Station in China**

#### 4.1 Key Enterprises

##### 4.1.1 State Grid Corporation of China

##### 4.1.2 China Southern Power Grid

##### 4.1.3 China Potevio

##### 4.1.4 SINOPEC

#### 4.2 Construction Scale

### **5. Construction of Electric Vehicle Charging Station in Key Cities of China**

#### 5.1 Northeast China

##### 5.1.1 Changchun

##### 5.1.2 Harbin

##### 5.1.3 Dalian

#### 5.2 North China

##### 5.2.1 Beijing

##### 5.2.2 Tianjin

##### 5.2.3 Other Cities

#### 5.3 East China

##### 5.3.1 Shanghai

##### 5.3.2 Hangzhou

##### 5.3.3 Hefei

##### 5.3.4 Jinan

##### 5.3.5 Nanjing

##### 5.3.6 Other Cities

#### 5.4 Central China

##### 5.4.1 Wuhan

##### 5.4.2 Changsha

##### 5.4.3 Zhengzhou

##### 5.4.4 Other Cities

#### 5.5 South China

##### 5.5.1 Guangzhou

##### 5.5.2 Shenzhen

##### 5.5.3 Other Cities

#### 5.6 Southwest China

##### 5.6.1 Chongqing

##### 5.6.2 Kunming

##### 5.6.3 Chengdu

##### 5.6.4 Other Cities

#### 5.7 Northwest China

##### 5.7.1 Xi'an

##### 5.7.2 Lanzhou

##### 5.7.3 Taiyuan

##### 5.7.4 Yinchuan

##### 5.7.5 Lingwu

##### 5.7.6 Urumqi

### **6. Key Electric Vehicle Charging Equipment Manufacturers**

#### 6.1 NARI

##### 6.1.1 Profile

##### 6.1.2 Operation

##### 6.1.3 Revenue Structure

##### 6.1.4 Charging Station Equipment Business

#### 6.2 Shenzhen Auto Electric Power Plant

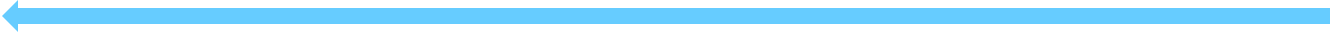
#### 6.3 XJ Power

#### 6.4 Sieyuan Electric

#### 6.5 Henan Senyuan Electric

#### 6.6 Rongxin Power Electronic

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- Typical Configuration of Bus Charging Station and Public Charging Station
- Major Policies on Electric Vehicle Industry in China, 2009-2012
- Subsidies for Demonstration and Promotion of Passenger Cars and Light Commercial Vehicles
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- Operating Revenue and Proportion of Senyuan Electric by Product, 2009-2011
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  - Operating Revenue and Proportion of Rongxin Power Electronic by Product, 2010-2011

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