



# China Electric Vehicle Industry Report, 2012

Jun 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 National Bureau of Statistics of China, China Customs and CAAM etc.

## Abstract

Since 2009, China has staged electric vehicle promotion activities in 25 pilot cities. Seen from the completion of promotion schedule and the utilization of charging stations in major pilot cities in 2011, the market promotion for electric vehicle was still in its infancy in China. In 2011, China only sold 8,000 electric vehicles, accounting for less than 1% of the total global sales volume.

In April 2012, China issued the electric vehicle plan, which stipulated that pure EV would play a key role; the output and sales goal in 2015 is to reach 500,000 and the goal in 2020 is to hit 5 million, which will accelerate the development pace of manufacturers of electric vehicles and related parts.

### **In the field of passenger cars:**

In 2011, China produced 8,000 electric vehicles, of which passenger cars occupied 60%. The electric passenger vehicles in China mainly cover three models, namely HEV, EV and FCV, wherein EV takes a dominant position. In China's electric vehicle demonstration and promotion catalog, EV made up 70%, HEV 22% and FCV 8%.

In 2012, 5 EV models are selected as official vehicles of Chinese governments; 4 of them are EVs, and the rest one is HEV. This is a big progress for Chinese electric vehicles to be chosen for governmental use. Driven by the future policies, more and more electric vehicles will be official vehicles.

Among electric passenger car manufacturers, SAIC has invested the most with RMB45 billion in building the electric vehicle industry chain, and launched more than ten EV models. In its investment, RMB4.4 billion will be used for the construction of SAIC Technology Center, RMB1.8 billion for the R&D of high-end electric vehicle - Roewe 950, and RMB8 billion for the infrastructure construction of electric vehicles. The electric vehicle sales of SAIC in 2012 targeted for 1,000.

## In the field of buses:

China performs maturely in the promotion of electric buses. City buses play main roles. As of May 2012, in the electric vehicle promotion catalog, pure electric buses and hybrid buses accounted for 50.78% and 48.06% of the total number of electric buses respectively. But in reality, hybrid ones are in the dominant position. In 2011, the number of hybrid buses in China swept 85.12% of the total number.

Ankai Automobile, the best player in the domain of electric buses, began the R&D of electric vehicles in 2003. As of May 2012, its 19 pure electric bus models and six hybrid bus models have been included in the promotion catalog, superior to other bus enterprises. Ankai Automobile focuses on pure electric cars. In 2011, Ankai Automobile sold 355 pure electric buses, and the cumulative sales volume reached more than 600, with 60% share in the pure electric bus market.

## The report covers:

- ◆ The status quo of Chinese electric vehicle technology, and the development of the industrial chain.
- ◆ Chinese policies and planning for electric vehicle, as well as their impact on the electric vehicle industry.
- ◆ Size and pattern as well as development trend of global and Chinese electric vehicle markets.
- ◆ Electric vehicle development and development planning in major regions of China.
- ◆ Electric passenger car market, and development and planning of major companies.
- ◆ Electric bus car market, and development and planning of major companies.

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