



**China Electric Vehicle Industry
Report, 2013**

May 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

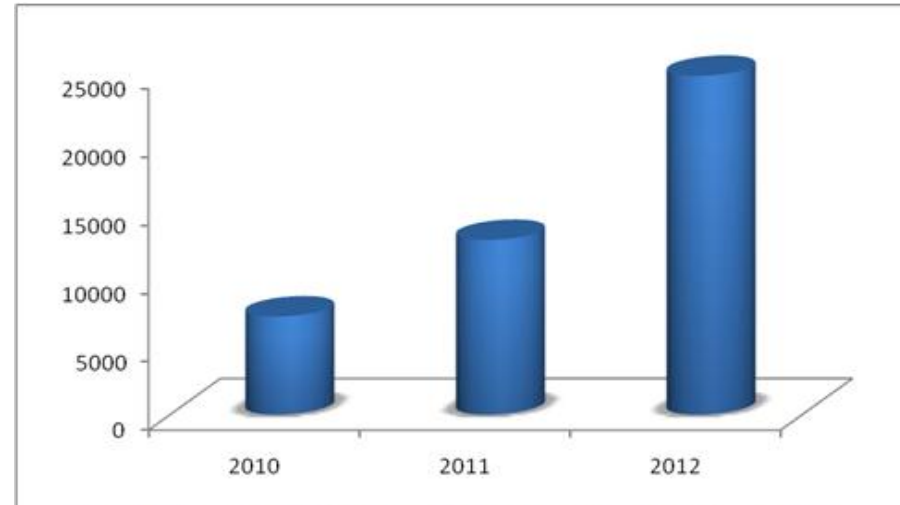
By 2012, 25 pilot cities had promoted 27,432 new energy vehicles totally within two years after the subsidy policy was implemented, including 23,032 ones used in public services and 4,400 ones bought by individuals.

In March, 2013, the Ministry of Finance, the Ministry of Science and Technology, the Ministry of Industry and Information Technology and Development and Reform Commission reached a consensus, determining to prolong the new energy vehicle subsidy policy by three years. The new subsidy policy emphasizes two aspects: First, it expands the scope of pilot cities; second, it plans to support energy-saving hybrid models with more subsidies. In addition, the new subsidy policy unifies the subsidies of all regions and changes the situation that subsidies vary from region to region.

As new energy vehicles are demonstrated and popularized as well as individuals enjoy subsidies when purchasing new energy vehicles, the domestic output of electric vehicles still maintains a rapid growth.

According to the Ministry of Industry and Information Technology, the output of 628 models included in Directory of Recommended Models of Energy-saving and New Energy Vehicles for Demonstration and Application hit 24,800 in 2012, up 94% year on year, of which there were 14,700 passenger cars and more than 10,000 commercial vehicles; there were 13,300 pure electric vehicles, 10,400 conventional hybrid vehicles, and more than 1,000 plug-in hybrid vehicles.

Output and Sales Volume of Electric Vehicles in China, 2010-2012



Source: Ministry of Industry and Information Technology of PRC; ResearchInChina China Electric Vehicle Industry Report, 2013

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The report analyzes the industrial environments and market of electric vehicles, main demonstration cities, and major production enterprises. Besides, it studies the models contained in the demonstration and promotion directory released by the Ministry of Industry and Information Technology (As of April 2013, there had been 44 batches).

Anhui JAC Co., Ltd. is one of the first companies that are engaged in research and development of new energy vehicles in China. In 2009, JAC clarified that it targeted "pure electric vehicles". In 2010 and 2011, JAC popularized 1,585 pure electric vehicles. As of the end of 2012, JAC had built a production line with an annual capacity of 20,000 electric vehicles. In accordance with the development plan, the company's annual electric vehicle capacity will reach 100,000 by 2015, and the models will extend from sedans to SUV, special vehicles and buses.

Anhui Ankai Automobile Co., Ltd. is a listed company designated by China to produce luxury buses. As of April 2013, Ankai's 44 hybrid and pure electric models had been incorporated in Directory of Recommended Models of Energy-saving and New Energy Vehicles for Demonstration and Application. It acts as one of leading players in the domestic new energy bus field. As of the end of 2012, Ankai had boasted over 1,000 new energy buses, which run in 27 cities including Beijing, Shanghai, Dalian and Hefei.

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