



China EV Charging Station Market Report,
2012-2013

June 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

The EV charging station serves as a crucial part in the electric vehicle industry. With continued policies on EV subsidy and promotion in China, the construction of EV charging station has been on a fast growth track. As of late 2012, China had constructed 443 EV charging stations with EV charging piles numbering over 18,000.

State Grid Corporation of China is one of the state-owned companies tapping into the EV charging station field. As of late 2012, the State Grid Corporation of China had built 14,703 charging piles in 25 demonstration cities across China, 353 charging stations with 191 battery swapping stations included. In addition, SGCC also finished Zhejiang demonstration project and Suzhou-Shanghai-Hangzhou intercity connected first-phase project with regard to smart E-Station service network.

In addition to SGCC, oil tycoons including Sinopec, PetroChina and CNOOC have embarked on the EV charging infrastructure construction field.

At present, Beijing, Shenzhen, Hangzhou and Shanghai have massive investment in the construction of EV charging stations.

The report touches on the status quo of China EV charging station development based on the environment of EV industry, and highlights the construction of EV charging stations in major Chinese cities. Besides, it also gives an analysis on the charging station equipment companies such as NARI Technology Development and Shenzhen Auto Electric Power Plant.

On Mar.16, 2012, the world's largest pure EV charging station-Beijing GaoAnTun EV Charging station-was formally put into service. As of late 2012, Beijing had set up four large-and mid-scale charging stations located in GaoAnTun, Beitucheng, Hangtianqiao and Majialou, as well as 15 charging pile groups concentrating in Xizhimen Bridge, Hujialou, Datun, Yuejialou Bridge, Wanquanhe Bridge and Fengbeilu Bridge. During the 12th Five-Year Plan period (2011-2015), Beijing is set to construct 10 large-scale charging stations, 256 E-Stations plus 210 small delivery terminals.

Shanghai began to build EV charging stations from 2010. As of late Dec.2012, the city had constructed cumulatively 12 E-Stations and 1,710 charging piles covering all over the city, preliminary forging an EV charging service intelligent network. In particular, the E-station situated in Anting of Jiading is the domestically first EV charging station equipped with elevating three-dimensional garage. Besides, Shanghai is scheduled to further optimize the operation model of EV charging stations and, to build another 8 charging stations as well as 310 charging piles within 2013.

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