China Charging Station and Charging Pile Market Report, 2014-2015

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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.

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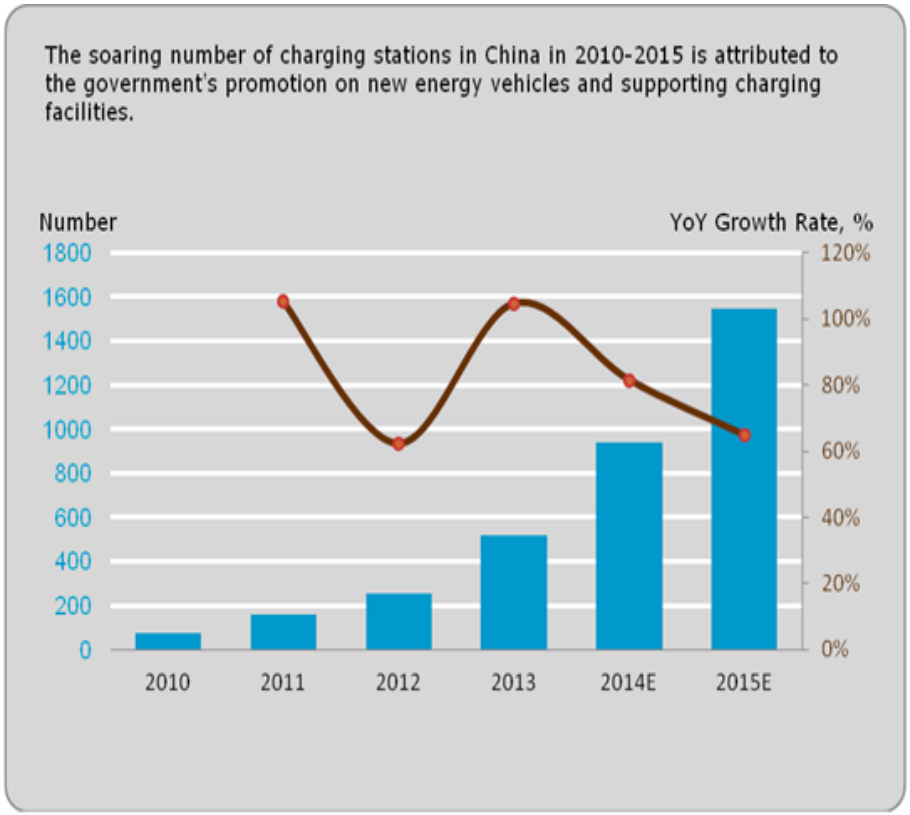
Abstract

In 2013, the global new energy vehicle market witnessed rapid development and new energy vehicles gradually became the preferred alternative to ordinary cars. Chinese new energy automobile market grew quickly under the government's vigorous support, although the total market capacity was still at a low level. China's new energy vehicle output and sales volume reached 17,533 and 17,642 respectively in 2013, showing the separate year-on-year increase of 39.7% and 37.9%; wherein, the output and sales volume of pure electric vehicles were 14,243 and 14,604 respectively, while the output and sales volume of hybrid vehicles amounted to 3,290 and 3,038 separately.

According to the promotion plan released by the Government in November 2013 and February 2014, 348,400 new energy vehicles will be popularized by the end of 2015, and charging stations and piles will correspondingly see prompt development. In 2010-2013, the number of Chinese charging stations jumped from 76 to 518 at the CAGR of 89.6%, and the number of charging piles ascended from 1,122 to 22,528 with the CAGR of 171.8%.

Number of Chinese Charging Stations and YoY Growth Rate, 2010-2015E



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The charging station market pattern dominated by State Grid Corporation of China and China Southern Power Grid has taken shape. As of the end of 2013, State Grid had built 19,000 electric vehicle charging piles, 400 charging and swap stations (including 209 charging stations and 191 swap stations), a smart charging and swap network of demonstration project in Zhejiang and Suzhou-Shanghai-Hangzhou Intercity Project (Phase I); China Southern Power Grid had completed 3,528 charging piles, 118 charging and swap stations and focused on the construction of smart charging and swap network in the Pearl River Delta. In addition, Sinopec, CNPC and CNOOC also set up a small number of refueling and charging experiment stations by virtue of the existing gas stations.

The report focuses on the following aspects:

※Development (industrial policies, laws and regulations) of the automotive charging station and pile industry;

※ Market size, market structure, supply & demand and competition patterns of the automotive charging station and pile industry;

※ Impact from upstream and downstream sectors on the global and China automotive charging station and pile industry;

※ Operation and development strategies of seven key global and Chinese automotive charging station enterprises.

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