



China Electric Vehicle Industry Report, 2014

Aug. 2014

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

With the implementation of fiscal subsidies, demonstration and popularization, purchase tax exemption, local barriers-dismantling and other favorable policies, China's electric vehicle market has seen accelerated development. In the first half of 2014, China's electric vehicle sales volume exceeded 20,000, more than the last year's total. Based on this, the sales volume throughout the year will be around 50,000, and the industry average growth rate will be maintained above 50% for years to come.

Now, electric vehicles in China are mainly concentrated in the field of bus, the development of passenger car market is relatively lagging behind. China's electric passenger car market used to be dominated by electric taxis and a small quantity of official cars, however, driven by the fiscal subsidy, purchase tax exemption and other good policies, and along with the continuous improvement of infrastructures e.g. charging station and charging pile, the electric car private consumption market has begun to grow fast.

Passenger vehicle enterprises in China have stepped up their layout in the field of electric vehicles; foreign companies are piling in, too.

Electric Passenger Vehicle Industry Development Strategy of Major Enterprises in China

Enterprise	Main Product	Planning Target / Development Strategy
	Roewe E50, Roewe550 Plug-in, Roewe 750 Hybrid, etc.	To see market share of 20% in 2015
	Besturn B50, Besturn B70, Weizhi V5, Oley EV, etc.	To see market share of over 15% in 2020
	Venucia e30, etc.	To achieve 100,000 in moderate-to-severe HEV ownership and 50,000 in BEV production and marketing in 2015
	E6, Qin, Tang, Denza, etc.	To reach sales volume of 20,000 units in 2014
	Raeton, Eado, etc.	To reach capacity of 100,000 in 2015
	QQ3 EV, M1 EV, M1 REEV, Qoros, etc.	To concentrate on A00 and A0-level market
	Emgrand Hybrid, Emgrand Cross Concept, EC7-EV, etc.	To focus on the Emgrand brand
	E150, Senova EV, C30DB, etc.	To get sales volume of 20,000 in 2014, 30,000 in 2015, and 100,000 in 2018.
	Trumpchi, e-Linker, etc.	To realize production and marketing of about 200,000 energy-efficient and new-energy vehicles in 2015

Source: China Electric Vehicle Industry Report, 2014; ResearchInChina

Concerning local companies, BYD enjoys a relatively impeccable layout, with more leading product and technical reserves. In the area of plug-in hybrid electric vehicle (PHEV), there are F3DM, S6DM, Qin, Tang, M3DM and other models; in the field of electric vehicle (EV), there are K9, E6, Qin EV, Denza EV, and so on. In the future, electric cars T3, T5, T7, etc. applied to the logistics domain will be launched to realize a multi-field layout.

As for foreign companies, Tesla, BMW, Volkswagen, etc. have entered the Chinese market in succession. BMW plans to introduce three electric vehicle models within 2014; Volkswagen AG will embark on electric car production in China from 2016; Tesla Model S has posted sales volume of 1,545 vehicles in the first half of 2014, targeting to hit 5,000 in 2014 and 10,000 in 2015.

China Electric Vehicle Industry Report, 2014 by ResearchInChina mainly covers the followings:

- ➔ Policies and industry planning;
- ➔ Sales volume and forecasts (by electric vehicle type);
- ➔ Corporate layout;
- ➔ Major players in the field of infrastructure and key components;
- ➔ Development of model cities;
- ➔ Electric vehicle development, staple products, sales, development strategy of major enterprises.

1. Overview of China Electric Vehicle Industry

- 1.1 Introduction and Classification of Electric Vehicle
 - 1.1.1 Introduction
 - 1.1.2 Classification
 - 1.1.3 Technology Roadmap
- 1.2 Industry Chain

2. Policy Environment for China Electric Vehicle Industry

- 2.1 Major Policies
 - 2.1.1 Fiscal Subsidy Policy
 - 2.1.2 Demonstration & Promotion Policy
 - 2.1.3 Others
- 2.2 Industry Planning
 - 2.2.1 Overall Industry Planning
 - 2.2.2 Technology Development Planning

3. China Electric Vehicle Market

- 3.1 Sales Volume
 - 3.1.1 Global
 - 3.1.2 China
 - 3.1.3 Proportion of Automobile Market
- 3.2 Market Structure
- 3.3 New Models
- 3.4 Corporate Layout

- 3.4.1 Local Enterprises
- 3.4.2 Foreign Enterprises
- 3.4.3 Channel Layout
- 3.4.4 Industry Chain Layout
- 3.5 Infrastructure
- 3.6 Key Components
 - 3.6.1 Battery
 - 3.6.2 Motor
 - 3.6.3 Inverter
 - 3.6.4 IGBT

4. China Electric Vehicle Market Segments

- 4.1 By Power Type
 - 4.1.1 PEV
 - 4.1.2 PHEV
- 4.2 By Model
 - 4.2.1 Passenger Vehicle
 - 4.2.2 Bus

5. Model City

- 5.1 Municipality
 - 5.1.1 Beijing
 - 5.1.2 Tianjin
 - 5.1.3 Shanghai
 - 5.1.4 Chongqing
- 5.2 Urban Agglomeration
 - 5.2.1 Hebei Urban Agglomeration

- 5.2.2 Zhejiang Urban Agglomeration
- 5.2.3 Fujian Urban Agglomeration
- 5.2.4 Jiangxi Urban Agglomeration
- 5.2.5 Guangdong Urban Agglomeration
- 5.2.6 Guizhou Urban Agglomeration
- 5.2.7 Yunnan Urban Agglomeration
- 5.2.8 Inner Mongolia Urban Agglomeration
- 5.2.9 Jiangsu Urban Agglomeration
- 5.2.10 Changsha-Zhuzhou-Xiangtan Region
- 5.3 Others
 - 5.3.1 Hefei, Anhui Province
 - 5.3.2 Wuhu, Anhui Province
 - 5.3.3 Taiyuan, Shanxi Province
 - 5.3.4 Jincheng, Shanxi Province
 - 5.3.5 Zhengzhou, Henan Province
 - 5.3.6 Xinxiang, Henan Province
 - 5.3.7 Wuhan, Hubei Province
 - 5.3.8 Xiangyang, Hubei Province
 - 5.3.9 Guangzhou, Guangdong Province
 - 5.3.10 Shenzhen, Guangdong Province
 - 5.3.11 Qingdao, Shandong Province
 - 5.3.12 Zibo, Shandong Province
 - 5.3.13 Linyi, Shandong Province
 - 5.3.14 Weifang, Shandong Province
 - 5.3.15 Liaocheng, Shandong Province
 - 5.3.16 Dalian, Liaoning Province
 - 5.3.17 Shenyang, Liaoning Province

- 5.3.18 Changchun, Jilin Province
- 5.3.19 Harbin, Heilongjiang Province
- 5.3.20 Haikou, Hainan Province
- 5.3.21 Chengdu, Sichuan Province
- 5.3.22 Luzhou, Sichuan Province
- 5.3.23 Xi'an, Shaanxi Province
- 5.3.24 Lanzhou, Gansu Province
- 5.3.25 Kunming, Yunnan Province
- 5.3.26 Ningbo, Zhejiang Province

6. Major Chinese Electric Vehicle Manufacturers

- 6.1 SAIC Motor
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Electric Vehicle Products
 - 6.1.4 Development Strategy for Electric Vehicle
- 6.2 FAW Group
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Electric Vehicle Products
 - 6.2.4 Development Strategy for Electric Vehicle
- 6.3 Dongfeng Motor Corporation
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Electric Vehicle Products
 - 6.3.4 Development Strategy for Electric Vehicle

- 6.4 BYD
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Electric Vehicle Products
 - 6.4.4 Development Strategy for Electric Vehicle
- 6.5 Changan Automobile
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Electric Vehicle Products
 - 6.5.4 Development Strategy for Electric Vehicle
- 6.6 Chery Automobile
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Electric Vehicle Products
 - 6.6.4 Development Strategy for Electric Vehicle
- 6.7 Geely
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Electric Vehicle Products
- 6.8 BAIC Group
 - 6.8.1 Profile
 - 6.8.2 Operation
 - 6.8.3 Electric Vehicle Products
- 6.9 GAC Group
 - 6.9.1 Profile
 - 6.9.2 Operation
 - 6.9.3 Electric Vehicle Products

- 6.10 Ankai
 - 6.10.1 Profile
 - 6.10.2 Operation
 - 6.10.3 Electric Bus Business
- 6.11 King Long
 - 6.11.1 Profile
 - 6.11.2 Operation
 - 6.11.3 Electric Bus Business
- 6.12 Zhongtong Bus
 - 6.12.1 Profile
 - 6.12.2 Operation
 - 6.12.3 Electric Bus Business
- 6.13 Yutong Bus
 - 6.13.1 Profile
 - 6.13.2 Operation
 - 6.13.3 Electric Bus Business
- 6.14 AsiaStar
 - 6.14.1 Profile
 - 6.14.2 Operation
 - 6.14.3 Electric Bus Business
- 6.15 Brilliance Auto
- 6.16 Great Wall Motors
- 6.17 JAC Motors

7. Summary and Forecast

- 7.1 Market Summary and Forecast
- 7.2 Corporate Planning and Layout

- Main Types of New Energy Vehicle
- Classification of Hybrid Electric Vehicle
- Emphasis of New Energy Vehicle Technology in Main Countries/Regions
- Technology Roadmap of China New Energy Vehicle
- Electric Vehicle Industry Chain and Extended Industries
- Comparison between China's New and Old Electric Vehicle Subsidy Policies
- Subsidy Standards for Electric Passenger Vehicle in China, 2014
- Subsidy Standards for Electric Bus in China, 2014
- List of First-Batch New Energy Vehicle Promotion & Application Cities/Regions
- List of Second-Batch New Energy Vehicle Promotion & Application Cities/Regions
- China's New Energy Vehicle Demonstration City Promotion Plan, 2014-2015
- Investment of China's Local Governments in Electric Vehicle, 2011-2015
- Key Technology Layout of New Energy Vehicle in China, 2011-2015
- Global Electric Vehicle Sales Volume, 2011-2014
- China's Electric Vehicle Sales Volume, 2011-2017E
- Proportion of Electric Vehicle in China Auto Market, 2011-2013
- Proportion of Electric Vehicle in U.S. Auto Market, 2011-2013
- Comparison between China and U.S. Electric Vehicle Sales Volume, 2011-2013
- Electric Vehicle Market Structure in China (by Type of Power), 2011-2017E
- Electric Vehicle Market Structure in China (by Model), 2011-2017E
- Number of Recommended Electric Vehicle Models in China, 2009-2014
- Main Listed Electric Vehicle Models in China, 2009-2014
- Electric Vehicle Charging Station Construction Planning of State Grid, 2009-2020
- Major Chinese Power Lithium Battery Manufacturers
- Major Chinese Traction Motor Manufacturers and Supporting Customers

- Major Chinese Electric Vehicle Inverter Manufacturers
- Major Global Electric Vehicle IGBT (Insulated Gate Bipolar Transistor) Manufacturers
- Sales Volume of Pure Electric Vehicle in China, 2011-2017E
- Number of Recommended Pure Electric Vehicle Models in China, 2009-2014
- Release of Main Pure Electric Vehicles in China
- Release of Main Pure Electric Vehicles in Japan
- Release of Main Pure Electric Vehicles in the US
- Release of Main Pure Electric Vehicles in Germany
- Release of Main Pure Electric Vehicles in France
- Release of Main Pure Electric Vehicles in the UK and Italy
- Release of Main Pure Electric Vehicles in S. Korea
- Release of Main Pure Electric Vehicles in India
- Sales Volume of Plug-in Hybrid Electric Vehicles in China, 2011-2017E
- Number of Recommended Hybrid Electric Vehicle Models in China, 2009-2014
- Release of Main Plug-in Hybrid Electric Vehicles in China
- Release of Main Plug-in Hybrid Electric Vehicles in Japan
- Release of Main Plug-in Hybrid Electric Vehicles in the US
- Release of Main Plug-in Hybrid Electric Vehicles in Germany
- Release of Main Plug-in Hybrid Electric Vehicles in France, the UK, Sweden and Spain
- Sales Volume of Electric Passenger Vehicles in China, 2011-2017E
- Sales Volume of Electric Commercial Vehicles in China, 2011-2017E
- Life Cycle Cost Estimates of Bus by Type
- Advantages and Disadvantages of Technological Path of New Energy Bus
- Planned and Ongoing Electric Bus Projects in China
- Number of Employees in SAIC Motor 2008-2013

- Automobile Output and Sales Volume of SAIC Motor, 2010-2014
- Revenue and Net Income of SAIC Motor, 2010-2014
- Revenue Breakdown of SAIC Motor by Product, 2008-2013
- Gross Margin of SAIC Motor by Product, 2008-2013
- Revenue Breakdown of SAIC Motor by Region, 2008-2013
- Main Electric Vehicle Products of SAIC Motor and Its Joint Ventures
- Output and Sales Volume of Main Electric Vehicles of SAIC Motor, 2012-2014
- Automobile Output and Sales Volume of FAW Group, 2010-2014
- Revenue of FAW Group, 2009-2013
- Main Electric Vehicle Products of FAW Group and Its Joint Ventures
- Number of Employees in Dongfeng Motor, 2009-2013
- Output and Sales Volume of Dongfeng Motor, 2010-2014
- Revenue, Net Income and Gross Margin of Dongfeng Motor, 2008-2013
- Revenue Breakdown of Dongfeng Motor by Product, 2009-2013
- Gross Margin of Dongfeng Motor by Product, 2009-2013
- Revenue Breakdown of Dongfeng Motor by Region, 2009-2013
- Main Electric Vehicle Products of Dongfeng Motor and Its Joint Ventures
- Number of Employees in BYD, 2007-2013
- Automobile Output and Sales Volume of BYD, 2010-2014
- Revenue, Net Income and Gross Margin of BYD, 2007-2013
- Revenue Breakdown of BYD by Product, 2007-2013
- Gross Margin of BYD by Product, 2008-2013
- Revenue Breakdown of BYD by Region, 2008-2013
- Main Electric Vehicle Products of BYD
- Output and Sales Volume of Main Electric Vehicles of BYD, 2009-2014

- Sales Volume of BYD Electric Vehicles, 2014E
- Core Parts Supply Chain of BYD Electric Vehicles
- Number of Employees in Changan Automobile, 2008-2013
- Output and Sales Volume of Changan Automobile, 2010-2014
- Revenue, Net Income and Gross Margin of Changan Automobile, 2008-2013
- Revenue Breakdown of Changan Automobile by Product, 2008-2013
- Gross Margin of Changan Automobile by Product, 2008-2013
- Total Assets, Revenue and Net Income of Chongqing Changan New Energy Automobile Co., Ltd., 2009-2013
- Main Electric Vehicle Products of Changan Automobile
- Output and Sales Volume of Chery Automobile, 2010-2014
- Main Electric Vehicle Products of Chery Automobile
- Output and Sales Volume of Main Electric Vehicle Products of Chery Automobile, 2011-2014
- Automobile Output and Sales Volume of Geely, 2010-2014
- Revenue and Net Income of Geely, 2009-2013
- Main Electric Vehicle Products of Geely
- Automobile Output and Sales Volume of BAIC Group, 2010-2014
- Revenue and Total Profit of BAIC Group, 2009-2013
- Main Electric Vehicle Products of BAIC Group
- Output and Sales Volume of BAIC E150 EV, 2012-2014
- Automobile Output and Sales Volume of GAC Group, 2010-2014
- Revenue and Net Income of GAC, 2011-2014
- Main Electric Vehicle Products of GAC Group
- Number of Employees in Ankai, 2009-2013
- Sales Volume of Large/Medium/Light Bus of Ankai, 2010-2014
- Revenue, Net Income and Gross Margin of Ankai, 2008-2013
- Revenue Breakdown of Ankai by Product, 2008-2013

- Gross Margin of Ankai by Product, 2008-2013
- Revenue Breakdown of Ankai by Region, 2008-2013
- Name List and Revenue Contribution of Ankai's Top 5 Clients, 2012-2013
- Number of Employees in King Long, 2009-2013
- Sales Volume of Large/Medium/Light Bus of King Long, 2010-2014
- Revenue, Net Income and Gross Margin of King Long, 2008-2013
- Revenue Breakdown of King Long by Region, 2008-2013
- Number of Employees in Zhongtong Bus, 2009-2013
- Sales Volume of Large/Medium Bus of Zhongtong Bus, 2010-2014
- Revenue, Net Income and Gross Margin of Zhongtong Bus, 2008-2013
- Revenue Breakdown of Zhongtong Bus by Region, 2008-2013
- Name List and Revenue Contribution of Zhongtong Bus' Top 5 Clients, 2012-2013
- Number of Employees in Yutong Bus, 2008-2013
- Sales Volume of Large/Medium/Light Bus of Yutong Bus, 2010-2014
- Revenue, Net Income and Gross Margin of Yutong Bus, 2008-2013
- Revenue Breakdown of Yutong Bus by Region, 2008-2013
- Number of Employees in AsiaStar, 2008-2013
- Sales Volume of Large/Medium/Light Bus of AsiaStar, 2010-2014
- Revenue, Net Income and Gross Margin of AsiaStar, 2008-2013
- Revenue Breakdown of AsiaStar by Region, 2008-2013
- Main Electric Vehicle Product of Brilliance Auto
- Main Electric Vehicle Products of Great Wall Motors
- Main Electric Vehicle Products of JAC Motors
- Sales Volume of Electric Vehicle in China (by Model/Power Type), 2011-2017E
- Electric Vehicle Industry Planning and Development Strategy of Major Enterprises in China

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,200 USD
- Hard copy 2,400 USD
- PDF (Enterprisewide license)..... 3,500 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: