

**China Electric Vehicle Industry
Report, 2014-2015**

Apr. 2015

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

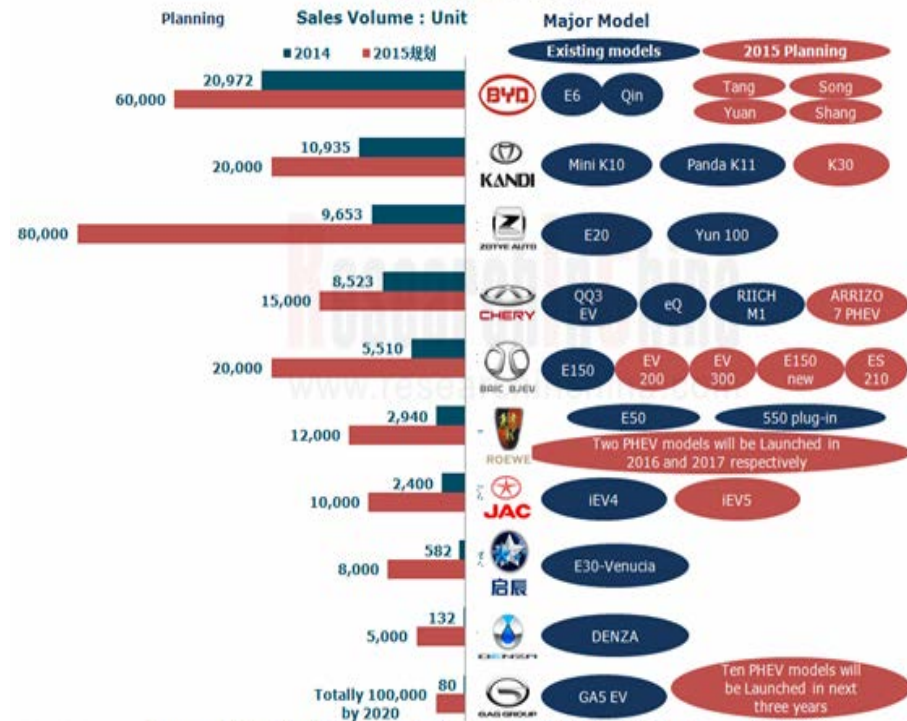
2014 may be called the “first year” of the development of Chinese electric vehicles, with annual sales reaching 74,763, 3.2 times higher than in 2013. With the ascent in the global electric vehicle market, China becomes the second largest market in the world after the United States, eyeing 23.5% market share. Among the top 20 most popular models in 2014, BYD Qin, Kandi K10, Chery QQ3 EV, Zotye E20, BAIC E150 EV and BYD e6 came from China, representing a combined 15.3% share of total sales in the global market.

In terms of market segments:

Almost 34,000 Chinese BEV passenger cars were sold in 2014, surging by 190% year on year; popular models were, in order, Chery QQ3EV, Zotye E20, BAIC E150 EV, BYD E6, JAC iEV4, and Zotye Cloud 100 with their market share totaling as high as 85%. BEV as the ultimate goal of China’s new energy vehicle development will still see new models launched by companies for participation in market competition.

In 2014, China recorded PHEV passenger car sales of 17,500, 123 times that in 2013. In today’s Chinese PHEV passenger car market, there are mainly BYD Qin and Roewe 550 plug-in with the former holding a dominant position with sales of 14,747. In 2015, Chang’an Automobile, Dongfeng Motor, GAC, Volvo, etc. are planning to launch PHEV models, which will intensify market competition. At the same time, companies affected by the policy are expected to turn to the development of EREV (extended range electric vehicle) models.

Electric Vehicle Sales Volume and Model Planning of Major Enterprises in China, 2014-2015



Source: China Electric Vehicle Industry Report, 2014-2015 by ResearchInChina

In the aspect of corporate development, Zotye, BYD, BAIC, Kandi, etc. have made plans for electric car sales target and models in 2015. Among them, Zotye shows the highest target of 80,000 in sales by continuing to rely on its two main models i.e. E20 and Cloud 100 with 50,000 and 30,000, respectively.

As the biggest winner in China's EV market, BYD sold an accumulative of 20,972 electric cars in 2014, with its market share rising to 28.05%; there are mainly Qin (plug-in), E6 (BEV) and DENZA (BEV, a joint venture brand) in passenger vehicle market, K9 (battery-electric bus) and J9 (heavy battery-electric truck) in commercial vehicle market. In 2015, BYD continues to focus on the passenger vehicle market by launching Tang (Q1, mid-size SUV), Shang (Q2, MPV), Song (Q3, compact SUV) and Yuan (Q4, small SUV) quarter by quarter.

Kandi, a dark horse in China's EV market, obtained the qualification for producing electric cars with the help of Geely Automobile. In 2014, it posted sales of 10,935, second only to BYD. Concerning its two EV models i.e. Mini K10 and Panda K11, the former is self-produced by Kandi while the latter in the light of Geely Panda. In July 2013, Kandi and Geely were pioneered in China's "micro-bus" mode in Hangzhou and promoted the business model of by-hour lease which was later copied to Shanghai, Chengdu, Nanjing, Guangzhou, Wuhan, Changsha, Changzhou, etc. in succession. By the end of 2014, Kandi's micro-bus project has launched a total of 14,398 electric cars.

The New BEV Passenger Car Production Enterprise Investment Projects and Rules on the Production Admission Administration has completed opinion collection in March 2015 and is expected to be introduced within the year. In accordance with the opinion draft, there is hope of loosening electric car production qualification in China, Then parts manufacturing firms (e.g. Wanxiang), internet companies (e.g. Letv), low-speed electric car companies (e.g. Yogomo) and other non-traditional car companies are likely to get the electric car production license, and Chinese electric vehicle market will present the characteristics of diversification.

The report highlights the followings:

- Policy environment for China's electric vehicle market;
- Global and China's electric vehicle market sales, and sales of main models;
- China's electric vehicle market structure and competition pattern;
- Sales, main models, and import market of two segments i.e. BEV passenger car and PHEV passenger car in China;
- Major companies in China's electric car infrastructure and key components;
- Development of electric vehicle demonstration cities in China;
- EV development, products, sales, development strategy, etc. of major companies in China.

1. Overview of 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 Electric Vehicle Industry

- 2.1 Fiscal Subsidy Policy
- 2.2 Demonstration & Promotion Policy
- 2.3 Preferential Tax Policy
- 2.4 Production Permission Policy

3. Electric Vehicle Market

- 3.1 Sales Volume
 - 3.1.1 Global
 - 3.1.2 China
 - 3.1.3 Comparison between China and Foreign Countries
- 3.2 Competition Pattern
- 3.3 Market Structure
- 3.4 Import Market
 - 3.4.1 BEV
 - 3.4.2 PHEV
- 3.5 Infrastructure
 - 3.5.1 Charging Station

- 3.5.2 Charging Pile
- 3.5.3 Development Planning
- 3.6 Key Parts
 - 3.6.1 Battery
 - 3.6.2 Motor
 - 3.6.3 Inverter
 - 3.6.4 IGBT

4. China Electric Passenger Vehicle Market

- 4.1 BEV Passenger Car
 - 4.1.1 Sales Volume
 - 4.1.2 Release
 - 4.1.3 Competition Pattern
- 4.2 PHEV Passenger Car
 - 4.2.1 Sales Volume
 - 4.2.2 Release
 - 4.2.3 Competition Pattern

5. Electric Vehicle Demonstration 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 Chang-Zhu-Tan Region
- 5.3 Other Cities
 - 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 Electric Vehicles Manufacturers in China

- 6.1 SAIC Motor
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Electric Vehicle Products
 - 6.1.4 Electric Vehicle Sales
 - 6.1.5 Strategy for Electric Vehicle Development
- 6.2 FAW Group
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Electric Vehicle Products
 - 6.2.4 Strategy for Electric Vehicle Development
 - 6.2.5 FAW Car
 - 6.2.6 FAW Haima
 - 6.2.7 FAW Toyota
 - 6.2.8 FAW-Volkswagen
- 6.3 Dongfeng Motor Corporation
 - 6.3.1 Profile

- 6.3.2 Operation
- 6.3.3 Electric Vehicle Products
- 6.3.4 Strategy for Electric Vehicle Development
- 6.4 BYD
 - 6.4.1 Profile
 - 6.4.2 Operation
 - 6.4.3 Electric Vehicle Products
 - 6.4.4 Electric Vehicle Sales
 - 6.4.5 Model Planning
 - 6.4.6 Strategic Layout
 - 6.4.7 Overseas Market
 - 6.4.8 DENZA
- 6.5 Chang'an Automobile
 - 6.5.1 Profile
 - 6.5.2 Operation
 - 6.5.3 Electric Vehicle Products
 - 6.5.4 Strategy for Electric Vehicle Development
- 6.6 Chery Automobile
 - 6.6.1 Profile
 - 6.6.2 Operation
 - 6.6.3 Electric Vehicle Products
 - 6.6.4 Strategy for Electric Vehicle Development
 - 6.6.5 by iVokaOS
- 6.7 Geely Automobile
 - 6.7.1 Profile
 - 6.7.2 Operation
 - 6.7.3 Electric Vehicle Products

- 6.7.4 Joint Ventures
- 6.7.5 Strategy for Electric Vehicle Development
- 6.8 BAIC Group
 - 6.8.1 Profile
 - 6.8.2 Operation
 - 6.8.3 Electric Vehicle Products
 - 6.8.4 Electric Vehicle Sales
 - 6.8.5 Planning for Electric Vehicle Development
 - 6.8.6 Joint Ventures
- 6.9 GAC Group
 - 6.9.1 Profile
 - 6.9.2 Operation
 - 6.9.3 Electric Vehicle Products
 - 6.9.4 Strategy for Electric Vehicle Development
- 6.10 Brilliance Auto
- 6.11 Great Wall Motors
- 6.12 JAC Motors
- 6.13 Kandi
- 6.14 Zotye

7. Market Summary

- 7.1 BYD Occupying the First Position
- 7.2 2015 Sales Target and Model Planning Released by Companies
- 7.3 Leasing Model Increasingly Popular
- 7.4 Joint-Venture Independent Brands Continuously Launched

- Main Types of New Energy Vehicle
- Classification of Hybrid Electric Vehicle
- Technical Focal Points for Electric Vehicle in Major Countries or Regions
- Technology Roadmap of New Energy Vehicle in China
- Electric Vehicle Industry Chain
- Comparison between China's New and Old Electric Vehicle Subsidy Policies
- Public Subsidy Standards for Electric Passenger Vehicle in China, 2013-2015
- Public Subsidy Standards for Electric Bus in China, 2013-2015
- Public Subsidy Standards for Electric Passenger Vehicle in China, 2016
- Public Subsidy Standards for Electric Bus in China, 2016
- 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
- Comparison between ICE and EV Taxes in China
- Catalogue of First-Batch New-energy Vehicles Exempt from Purchase Tax
- Catalogue of Second-Batch New-energy Vehicles Exempt from Purchase Tax
- Catalogue of Third-Batch New-energy Vehicles Exempt from Purchase Tax
- Global Electric Vehicle Sales, 2011-2018E
- Top 20 Global Electric Vehicle Sales, 2014
- China's Electric Vehicle Sales, 2011-2018E
- % of China's Electric Vehicle in, 2011-2014
- Proportion of China's Electric Vehicle in Auto Market, 2011-2014
- Proportion of American Electric Vehicle in Auto Market, 2011-2013
- Comparison between Chinese and American Electric Vehicle Sales, 2011-2014
- China's Mainstream Electric Vehicle Sales Ranking, 2014

- China's Electric Vehicle Market Structure by Power Type, 2011-2018E
- China's Electric Vehicle Market Structure by Model, 2011-2018E
- Import Volume of China's Main BEV Passenger Cars, 2014-2015
- Imported BEV Planned to Enter the Chinese Market (Including Those Launched)
- Imported PHEV (Including Range-extended) Planned to Enter the Chinese Market (Including Those Launched)
- Foreign PHEV Planned to Be Made in China
- Number of EV Charging Stations in China, 2010-2014
- Number of EV Charging Stations in Major Cities of China, 2014
- Number of EV Charging Piles in China, 2010-2014
- Number of EV Charging Piles in Major Cities of China, 2014
- Planning for State Grid EV Charging Station Construction, 2009-2020
- Major Power Lithium Battery Companies in China
- Major Drive Motor Companies in China and Their Customers
- Major EV Inverter Companies in China
- Major EV IGBT Companies Worldwide
- China's BEV Passenger Car Sales, 2013-2018E
- Release of Major Chinese BEV Passenger Cars
- China's BEV Passenger Car Sales by Model, 2012
- China's BEV Passenger Car Sales by Model, 2013
- China's BEV Passenger Car Sales by Model, 2014
- China's PHEV Passenger Car Sales, 2013-2018E
- Release of Major Chinese BEV Passenger Cars
- China's PHEV Passenger Car Sales by Model, 2013
- China's PHEV Passenger Car Sales by Model, 2014
- Automobile Production and Sales of SAIC Motor, 2010-2015E

- Revenue and Net Income of SAIC Motor, 2010-2014
- Gross Margin of SAIC Motor, 2010-2014
- Revenue of SAIC Motor by Product, 2010-2014
- Gross Margin of SAIC Motor by Product, 2010-2014
- Main Electric Vehicle Products of SAIC Motor and Its Joint Ventures
- Electric Vehicle Production and Sales of SAIC Motor, 2012-2015E
- Planning for SAIC Roewe Electric Vehicles
- Automobile Production and Sales of FAW Group, 2010-2015E
- Revenue of FAW Group, 2009-2013
- Main Electric Vehicle Products of FAW Group and Its Joint Ventures
- Production and Sales of Dongfeng Motor, 2010-2015E
- Revenue and Net Income of Dongfeng Motor, 2010-2014
- Gross Margin of Dongfeng Motor, 2010-2014
- Revenue of Dongfeng Motor by Product, 2010-2014
- Gross Margin of Dongfeng Motor by Product, 2010-2014
- Main Electric Vehicle Products of Dongfeng Motor and Its Joint Ventures
- Automobile Production and Sales of BYD, 2010-2015E
- Revenue, Net Income and Gross Margin of BYD, 2010-2014
- Gross Margin of BYD, 2010-2014
- Revenue of BYD by Product, 2010-2014
- Gross Margin of BYD by Product, 2010-2014
- Main Electric Vehicle Products of BYD
- Electric Vehicle Sales of BYD, 2013-2018E
- Electric Vehicle Sales Structure of BYD, 2014
- Supply Chain of Core Parts for BYD Electric Vehicle

- Planning for BYD Electric Vehicle Model, 2015
- Production and Sales of Chang'an Automobile, 2010-2015E
- Revenue and Net Income of Chang'an Automobile, 2010-2014
- Net Income of Chang'an Automobile, 2010-2014
- Total Assets, Revenue and Net Income of Chongqing Changan New Energy Automobile, 2009-2013
- Main Electric Vehicle Products of Chang'an Automobile
- Production and Sales of Chery Automobile, 2010-2015E
- Main Electric Vehicle Products of Chery Automobile
- Electric Vehicle Production and Sales of Chery Automobile, 2011-2015E
- Automobile Production and Sales of Geely, 2010-2015E
- Revenue and Net Income of Geely, 2009-2014
- Main Electric Vehicle Products of Geely
- Automobile Production and Sales of BAIC Group, 2010-2015E
- Revenue and Total Profit of BAIC Group, 2009-2014
- Main Electric Vehicle Products of BAIC Group
- Production and Sales of BAIC E150 EV, 2012-2015E
- Corporate Structure of BAIC BJEV
- Automobile Production and Sales of GAC Group, 2010-2015E
- Revenue and Net Income of GAC Group, 2011-2014
- Gross Margin of GAC Group, 2011-2014
- Main Electric Vehicle Products of GAC Group
- Production and Sales of Brilliance Auto, 2010-2015E
- Revenue of Brilliance Auto, 2012-2014
- Main Electric Vehicle Models of Brilliance Auto
- Production and Sales of Great Wall Motors, 2010-2015E

- Revenue and Net Income of Great Wall Motors, 2010-2014
- Gross Margin of Great Wall Motors, 2010-2014
- Main Electric Vehicle Models of Great Wall Motors
- Production and Sales Volume of JAC Motors, 2010-2015E
- Revenue and Net Income of JAC Motors, 2010-2014
- Gross Margin of JAC Motors, 2010-2014
- Main Electric Vehicle Products of JAC Motors
- Ownership Structure of Kandi
- Financial Indicators of Kandi, 2012-2014
- Automobile Sales of Kandi, 2010-2014
- Main Electric Vehicle Products of Kandi
- Kandi Electric Micro-bus Layout in China
- Automobile Production and Sales of Zotye, 2010-2015E
- Electric Vehicle Market Share of Major Companies in China, 2014
- Electric Vehicle Sales and Model Planning of Major Companies in China, 2015
- Major Electric Vehicle Rental Cases in China
- Joint-Venture Independent Electric Vehicle Brands 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)2,350 USD
- Hard copy 2,500 USD
- PDF (Enterprisewide license)..... 3,700 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: