



China Battery Electric Logistics Vehicle Industry Report, 2017-2020

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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.

Abstract

The output of battery electric logistics vehicles didn't see a significant year-on-year increase in the first half of 2016 due to the failure of electric special-purpose vehicles to be included in the promotion catalogue. As it approached the end of the year and the market expected the introduction of subsidy policy and catalogue, the electric logistics vehicle output soared to 15,500 units in November, raising the total output for the first eleven months to 26,300 units. New energy trucks/special-purpose vehicles were included in the Catalogue of Recommended Models for NEV Promotion and Application (the 4th batch) in early December, a centralized shipment in the month helped full-month electric logistics vehicle output hit 31,200 units.

There were a total of 28 orders signed or clear cooperation intentions in 2016, involving 194,000 electric logistics vehicles. Orders or cooperation intentions still present the features of express delivery, big rental orders-driven, and clear regionality. Full-year sales volume of electric logistics vehicles will be around 45,000 units, based on license-plate registration/sales in December.

A rise in sales of electric logistics vehicles may happen in the second quarter of 2017 or later, affected by factors as follows: 1) Local subsidies are still undecided; 2) Carmakers have not fixed the prices and are negotiating with upstream battery/motor companies after the subsidies for 2017 are cut. And it is expected that the electric logistics vehicles will be gradually launched into the market in the second quarter of 2017. Electric logistics vehicles will still be dominated by mini ones, typified by Dongfeng Junfeng and BAIC Weiwang usually with electricity of around 40KWH and a mileage of 150-200km.

Cost sharing among every link of the industry chain will be a crucial factor after subsidy reduction in 2017. Take electric logistics vehicle with electricity of 40KWH for example, central subsidies plus local subsidies dropped by RMB58,500 in 2017 compared with the 2016 level. Reduced subsidies will be absorbed within the industry chain: 1) a decline in the cost of car body because of an expansion in vehicle manufacturing scale; 2) the cost reduction arising from the expansion in production and sales of batteries and motors; 3) an improvement in the level of operation.

It is expected about 100,000 electric logistics vehicles will be sold in 2017. On one hand, the order backlog has extended to 2017; on the other hand, new subsidy policies are relatively friendly to electric logistics vehicles, and retail prices are expected to remain stable or rise in an affordable range.

The electrification of logistics vehicles will continue, from bus to truck, with annual sales reaching an estimated 400,000 units in 2020. 36% and 29% of total sales are the electric logistics vehicles replacing light trucks and minivans which will be the most important replacement markets. The two markets will have a stable customer base composed of van users in the middle and low-end market and logistics enterprises in the high-end market over the next year or two.

China Battery Electric Logistics Vehicle Industry Report, 2017-2020 focuses on the following:

- ◆Development of new energy vehicles worldwide, including production and sales data in major NEV markets (U.S., Europe, etc.);
- ◆Development and trend forecast of new energy passenger car, bus, and logistics vehicle industries in China;
- ◆Battery electric logistics vehicles in China (development prospects, supportive elements, development factors and obstacles);
- ◆Policies on NEVs and battery electric logistics vehicles in China;
- ◆Battery electric logistics vehicles in China (output, sales, product mix, vehicle purchasing, operating costs, etc.);
- ◆Operation, capacity layout, and development strategy of 10 major Chinese battery electric logistics vehicle makers.

<p>1. Overview of Battery Electric Logistics Vehicle</p> <p>1.1 Definition and Characteristics</p> <p>1.1.1 Definition</p> <p>1.1.2 Classification</p> <p>1.1.3 Characteristics</p> <p>1.1.4 Operating Principle</p> <p>1.2 Target User</p> <p>1.3 Industry Chain</p> <p>2. Global and Chinese Electric Vehicle Market</p> <p>2.1 Global</p> <p>2.1.1 Overall</p> <p>2.1.2 U.S.</p> <p>2.1.3 Europe</p> <p>2.1.4 Japan</p> <p>2.2 China</p> <p>2.2.1 NEV Output</p> <p>2.2.2 NEV Sales</p> <p>3. Background of Battery Electric Logistics Vehicle Industry</p> <p>3.1 Development Direction of NEV</p> <p>3.2 Supportive Factors</p> <p>3.2.1 Rapid Development of Express Logistics Industry</p> <p>3.2.2 Urban Pollution and Traffic Pressure</p> <p>3.2.3 State Subsidies</p>	<p>3.3 Reasons for Rapid Development</p> <p>3.3.1 Changes in Terminal Logistics Services</p> <p>3.3.2 Urban Distribution Industry Pilot</p> <p>3.3.3 Light Logistics and Home Delivery as the Largest Market</p> <p>3.3.4 Timeshare Leasing</p> <p>3.4 Obstacles to Rapid Development</p> <p>4. Policies on Battery Electric Logistics Vehicle</p> <p>4.1 Policies on Battery Electric Logistics Vehicle</p> <p>4.1.1 National Policies on NEVs</p> <p>4.1.2 National Policy System for Battery Electric Logistics Vehicle</p> <p>4.1.3 Regional Policies and Development Planning</p> <p>4.2 Catalogue of Models Exempt from Purchase Tax</p> <p>5. Battery Electric Logistics Vehicle Industry in China</p> <p>5.1 Output</p> <p>5.2 Sales</p> <p>5.3 Product</p> <p>5.4 Costs</p> <p>6. Battery Electric Logistics Vehicle Makers</p> <p>6.1 Dongfeng Motor Corporation</p> <p>6.1.1 Profile</p> <p>6.1.2 Battery Electric Logistics Vehicle Models</p>	<p>6.1.3 Battery Electric Logistics Vehicle Output</p> <p>6.1.4 Capacity Layout</p> <p>6.1.5 Revenue</p> <p>6.2 Chongqing Ruichi Automobile Industry Co., Ltd.</p> <p>6.2.1 Profile</p> <p>6.2.2 Battery Electric Logistics Vehicle Solutions</p> <p>6.2.3 Battery Electric Logistics Vehicle Models</p> <p>6.2.4 Battery Electric Logistics Vehicle Output</p> <p>6.2.5 Capacity Layout</p> <p>6.3 Shaanxi Tongjia Automobile Co., Ltd.</p> <p>6.3.1 Profile</p> <p>6.3.2 Battery Electric Logistics Vehicle Solutions</p> <p>6.3.3 Battery Electric Logistics Vehicle Models</p> <p>6.3.4 Battery Electric Logistics Vehicle Output</p> <p>6.3.5 Capacity Layout</p> <p>6.4 Chongqing Lifan Motors Co., Ltd.</p> <p>6.4.1 Profile</p> <p>6.4.2 Battery Electric Logistics Vehicle Models</p> <p>6.4.3 Battery Electric Logistics Vehicle Output</p> <p>6.4.4 Capacity Layout</p> <p>6.5 Jiangsu AOXIN New Energy Automobile Co., Ltd.</p> <p>6.5.1 Profile</p> <p>6.5.2 Battery Electric Logistics Vehicle Models</p> <p>6.5.3 Battery Electric Logistics Vehicle Output & Sales</p> <p>6.5.4 Capacity Layout</p> <p>6.5.5 Revenue</p>
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