Global and China PV Charging Station Market 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.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

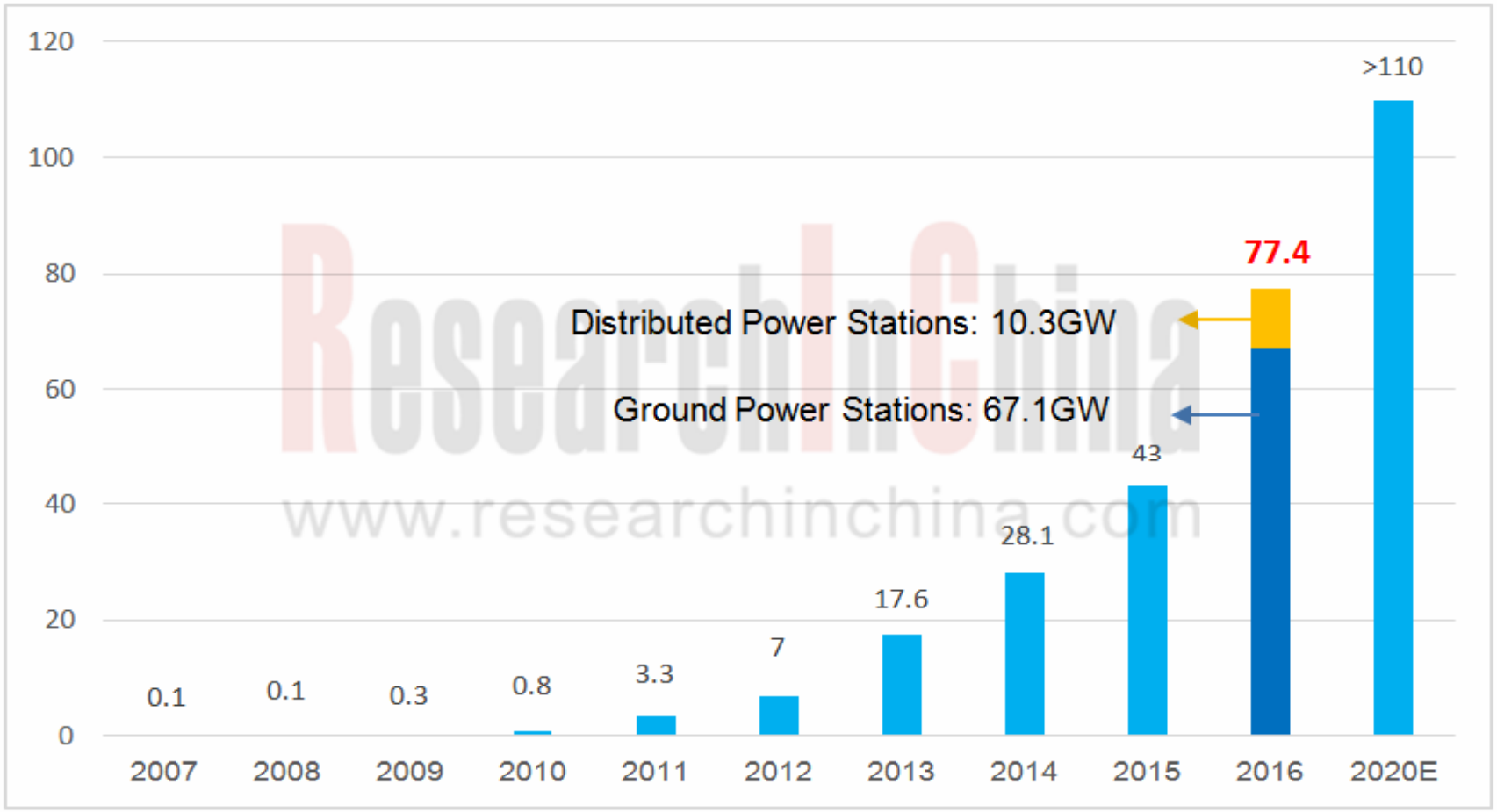
China produced 517,000 new energy vehicles in 2016, surging by 51.7% from a year earlier, including 263,000 battery-electric passenger vehicles, soaring 73.1% year on year, and 81,000 plug-in hybrid passenger vehicles, up 29.9%, 154,000 battery-electric commercial vehicles, rising by 50.2% year on year, and 18,000 plug-in hybrid commercial vehicles, decreasing by 22.5% year on year. In 2016, new energy vehicles made up 1.8% of China's total production and sales of vehicles (output: 28.119 million units, sales: 28.028 million units), an increase of four percentage points from a year ago. New energy vehicle ownership approximated 1 million units in China in 2016, basically accomplishing phased target of the Planning for the Development of New Energy Vehicle during 2012-2020. It is expected that EV sales will reach 2.11 million units in 2020 with EV ownership exceeding 5 million units.

Driven by rapid development of new energy vehicles, the supporting facilities like charging station and charging pile also flourish. Charging station ownership in China increased from 76 in 2010 to 5,600 in 2016 at a CAGR of 104.8%. The number of public charging piles grew from 1,122 to 150,000 at a CAGR of 126.1% during the same period. In addition to public charging piles, private charging pile ownership reached about 170,000 units nationwide in 2016, thus bringing the country's total number of charging piles up to nearly 310,000.

Energy-saving and new energy vehicles embody the future development direction of cars, and have become the commanding heights for new economic growth engines and strategic adjustment of the market. Meanwhile, the State will continue to introduce relevant standards and policies to support such vehicles. The construction of PV charging stations / piles in China mainly centers on experience, promotion and demonstration, with a small scale and only in Beijing, Shanghai, Jiangxi, Zhejiang, Shandong and Guangdong about 10 PV charging stations and 240 charging piles have been built.

In 2016, China's PV industry maintained the rebounding trend since 2015 and the industry's output value jumped 27% year on year to RMB336 billion, indicating the sound operation as a whole. The PV battery output was about 49GW, the PV module output hit 53GW or so, and the new PV grid-connected installed capacity amounted to 34.5GW, making China be the No.1 by industrial scale in the world.

China's Cumulative PV Installed Capacity (GW), 2007-2020E



As of the end of 2016, the cumulative installed capacity of the domestic PV had reached 77.42GW, ranking first around the globe. Only in 2016, the new installed capacity in China was up to 34.54GW, of which 30.3GW stemmed from terrestrial power stations and 4.24GW from distributed power stations; the installed capacity of distributed power stations soared by 200%, occupying the world's first place.

The report highlights the following:

◆Industrial policies on car charging stations/piles and PV power stations, including policies on subsidies for new energy vehicles, policies on subsidies and rewards for construction of charging piles, technical specifications for PV power station, the planning for construction of charging piles, policies on basic electricity tariff of charging and service charges over the next five years;

◆Development status of new energy vehicles around the world and in China, including output and sales data in major markets (global, USA, Europe, Japan, and China), and status quo & trends of new energy vehicles (passenger vehicle, bus, logistic vehicle) in China;

◆Global and China’s PV industry scale, covering status quo and future planning of the PV industry in the world's major countries, China’s PV industry chain size and technology directions, obstacles to PV charging technology development, etc;

◆Development of PV charging stations in China, including development of China's car charging station/pile market, analysis of 5-year planning for construction of charging piles, number and development directions of PV charging stations, development challenges of PV charging stations, etc;

◆Status quo and future planning of PV charging stations in 6 provinces and municipalities of China, etc;

◆Operation and development strategies of 8 Chinese suppliers of PV equipment;

◆Strategic layout of operators and potential entrants of PV charging stations in China, and their cooperation with PV equipment suppliers.

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