China Battery Electric Logistics Vehicle Industry Report, 2018-2025

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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

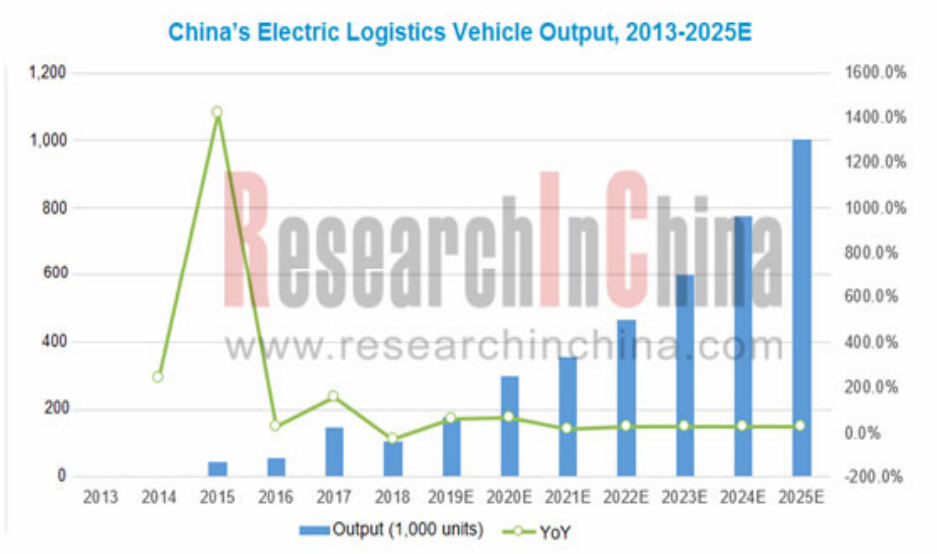
In 2018, China produced 1.27 million new energy vehicles (NEVs) in total, 59.9% more than in previous year. Wherein, 792,000 units were battery electric passenger cars and 278,000 units plug-in hybrid passenger cars, surging by 65.5% and 143.3% on an annualized basis, respectively; 194,000 units were battery electric commercial vehicles, up 3% year on year; 6,000 units were plug-in hybrid commercial vehicles, slumping by 58% from a year earlier.

Of the 27,809,000 automobiles made in China in 2018, NEV accounted for 4.57%, 2 percentage points higher than in 2017, and NEV ownership approached 2.61 million units. It is predicted that EV sales and ownership in China will reach up to 2.11 million units and more than 5 million units in 2020, respectively.

In 2018, there were 67,300 units of special NEVs sold in China, down 15% from a year ago and growing at a slow rate, while passenger cars packing the state-of-the-art technologies performed brilliantly. In 2018, the electric logistics vehicle output nosedived by 27.9% to 109,000 units year on year, which was mainly caused by higher requirements on electric logistics vehicle technologies in NEV subsidy policies and the long period of return on investment for distressed companies.

As concern manufacturers in China, auto brands like Chery, BAIC BJEV, Geely and SAIC make a cross-border foray into the logistics vehicle market, leading to a fast-changing industry pattern and invigorating the industry. In 2018, Chery produced more than 16,200 logistic vehicles, commanding 14.9% of the market; and automakers such as Dongfeng Motor, Chongqing Ruichi Automotive Industry and Shaanxi Tongjia Automobile also seized larger shares by electric logistics vehicle output, and the top ten players seized roughly 56.4% of the total production.

The increasing logistics demand and the expanding logistics operation platform will spur the battery electric logistics vehicle market during 2019-2020. China will expectedly produce 300,000 electric logistics vehicles in 2020, a figure projected to record one million units in 2025.



In 2018, 96% of electric logistics vehicles could travel over 200km; 32% had a range of more than 300km; and 9% exceeded 350km.
As for electric logistics vehicle battery materials, the descending subsidies promoted market demand for diversified power battery materials.

In the meantime, the electric logistics vehicle market headed toward segmentation, large scale, specialization and intelligence in 2018. In particular, the tendency toward electrified, intelligent and connected logistics vehicles was accompanied by the application of internet + platform solution and the launch of fuel cell logistics vehicles. It is forecasted that the internet + electric logistics vehicle platform will be a major contributor to the industry growth between 2019 and 2020.

China Battery Electric Logistics Vehicle Industry Report, 2018-2025 highlights the following:

◆Electric logistics vehicle (definition, classification, target customers, industry chain, etc.);
◆Global and Chinese EV market (output and sales, output and sales by region, and forecast);
◆Electric logistics vehicle industry (policies, market size, cost, business model, etc.);
◆Electric logistics vehicle industry (background, the latest technologies, and development trends);
◆Electric logistics vehicle companies (including 8 operators and 20 OEMs) (operation, logistics vehicle products, manufacturing base and capacity, etc.).

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