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# Latest Research Report on China’s New Energy Vehicle Market and Industry: 2001-2025 (2020 Edition)

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## Abstracts

### EXECUTIVE SUMMARY

### INTRODUCTION

Currently, COVID-19 epidemic is changing tendency and scale of global new energy vehicle market and industry in the foreseeable future. Combining the impacts of COVID-19 epidemic, the Chinese strategies and policies on new energy vehicle industry and market with projections for 2020 to 2025, the research report examined and analyzed the effects of Chinese government-led strategies and policies promoting the new energy vehicle industry, investigated the development of the Chinese entire new energy vehicle industry and the entire new energy vehicle market segments, revealed the pros and cons of the Chinese Government-led strategies and policies promoting the new energy vehicle industry. Its aim is to provide valuable enlightenment and policy recommendations for those economies that attempt to rapidly develop new energy vehicle industry and useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market.

The report includes an overview of China’s new energy vehicle industry and development course of China's new energy vehicle industry, the entire set of the Chinese government-led strategies and policies promoting new energy vehicle industry, the specific analysis and research on the Chinese government-led strategies and policies promoting the new energy vehicle industry, a panorama of China’s new energy vehicle industrial chain and the specific analyses on the Chinese top players in the new energy vehicle market segments, the prediction on sizes of the Chinese new energy vehicle market and industry from 2020 to 2025, the discussions on valuable enlightenment for those economies that attempt to rapidly develop new energy vehicle

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industry and policy recommendations, and the recommendations of useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market.

The research report revealed that the total sale volume of new energy vehicles is estimated to be at about 1.022 million units in 2020 and is anticipated to expand at a CAGR (Compound Annual Growth Rate) of 22.05% from 2021 to 2025; as well as the total output volume of new energy vehicles is estimated to be at about 1.081 million units in 2020, and is anticipated to grow at a CAGR of 22.32% from 2021 to 2025. China with population of 1.4 billion is a largest market in the world and its new energy vehicle market has significant demand growth potentiality.

From July 1 to 3, 2019, at “2019 World New Energy Vehicle Conference” held in Boao, Hainan, China, more than 1,500 experts and scholars of automobile-related practitioners from 18 countries and regions gathered in Boao to jointly explore the transformation and upgrading of the global automotive industry, the continuous improvement of the ecological environment, and the innovation and development trends of new energy vehicles in the fields of technology, industry, policy, and market mode. In 2018, the sold volume of new energy vehicles in major countries around the world exceeded 2.14 million units, and the sold volume in China reached 1.256 million units. The output and sale volumes of new energy vehicles in China has ranked number one in the world for four consecutive years. What is the power to push China's new energy vehicle industry to achieve such amazing achievements? Such proud achievements should be attributed to the Chinese government’s strategies and policies promoting the new energy vehicle industry.

The “2019 World New Energy Vehicle Conference” reached consensus: with the popularization and application of 5G communication, the electrification, intellectualization, networked and shared have become the main directions of the transformation and upgrading for China's automotive industry, and China's automotive industry has entered into a new stage of integration, mutual empowerment, and accelerated development. The power, production, operation, and application for automobiles will undergo a comprehensive change. The studies have shown that electrified, networked, and intellectualized electric vehicles will reduce the cost of mileage for shared travel by 45%-82% because the real-time sharing of traffic information by people, vehicles, and roads can improve travel efficiency. In 2020, with the gradual application and popularization of new technologies such as artificial intelligence and 5G communication, the new energy vehicles are expected to usher the new development opportunities.

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The Chinese government’s strategies and policies promoting the new energy vehicle industry are unique. The development of China's new energy vehicle industry relied upon on a series of government-led strategies and policies, and the government's generous fiscal incentives. Since 2012, the Chinese government implemented the “Development Plan on Energy-Saving and New Energy Vehicle Industry for 2012 to 2020”, the accumulated investment in the entire new energy vehicle industrial chain has exceeded 300 billion CNY. Nowadays, China's new energy vehicle industry is coming to the threshold of a transformation of policy-driven to market-driven. In order to further clarify the development path and policy support for the new energy vehicle industry, the Chinese Ministry of Industry and Information Technology is taking the lead in the formulation for the 'Development Plan on New Energy Vehicle Industry for 2021 to 2035'.

The Chinese government-led strategies, policies, and measures have promoted the rapid rise of China's new energy vehicle industry. Up to now, the development of China's new energy vehicle industry has gradually moved from government-led policies to turn the double promoted by policy-driven and market-driven. According to the data of China Association of Automobile Manufacturers (CAAM), the proportion of China's new energy vehicles in automobile production volume has increased from 0.04% in 2011 to 4.68% in 2019.

In recent years, however, China's population rapidly aging led its economic growth slowdown, plus China government slashed fiscal subsidies starting in July 2019 and paired with more stringent technical regulation caused a sharp decline in new energy vehicle demand and supply. As the Chinese government is exiting the fiscal support policy for new energy vehicles, the fiscal subsidy in 2019 is reduced by an average of 50% on the basis of 2018, the sold volume of China's new energy vehicles in November 2019 presented a rapid decline, a decrease of 43.7% year-on-year. The output volume and sale volume of China's new energy vehicle achieved 1.242 million units and 1.206 million units in 2019, decreased by 2.3%, and 4.0% respectively compared that of 2018. Entering into 2020, the unforeseen coronavirus outbroke in Wuhan, China in January. The Chinese authorities adopted measures of blockading various cities to prevent the spread of COVID-19 epidemic. The social and economic activities once were in the paralyzed status. In the first quarter of 2020, China's gross domestic product (GDP) shrank by nearly 1.5 trillion CNY, a decrease of 6.8% compared that same period in 2019. China's the output and sold volumes of new energy vehicles reached 105,000 units and 114,000 units respectively, presented rapidly decline by 60.2% and 56.4% year-on-year.

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China’s top leadership has recognized that keeping economic growth must further open its door toward the world. China's economic growth is glissading, so the Chinese authorities are looking forward to foreign capitals and foreign companies’ entry to shore up its economic growth. China is opening its door more and more up to foreign capitals and foreign companies. China with population of 1.4 billion still is an investment destination for foreign capitals and foreign companies. Tesla constructed the Gigafactory and achieved rapid mass production in Shanghai, China that is an outstanding testimony. China has continuously expanded its opening up to the world, and now it has formed a development pattern, in which Chinese and foreign automobile makers will go hand in hand in the field of China's new energy vehicles.

How do the transformation of the Chinese government’s strategies and policies promoting the new energy vehicle industry will affect the tendency of the new energy vehicle industry and overall new energy vehicle market in the foreseeable future? This research report made full and accurate research and analysis for Chinese new energy vehicle industry and prognosis for new energy vehicle market to 2025 based on our primary sources and secondary sources to reveal the valuable enlightenment for those economies that attempt to rapidly develop new energy vehicle industry as well as the useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market.

## RESEARCH OBJECTIVES

The objectives of this research report are as follows:

- to provide a strategic perspective of the Chinese new energy vehicle industry, including the government policies and measures drivers;
- to give an overview of government strategies and policies promoting new energy vehicle industry and market;
- to analyze the efficacy of government-led strategies and policies promoting new energy vehicle industry and market on supply-side and demand-side;
- to sketch a panorama of China’s new energy vehicle industry chain;
- to analyze the Chinese top players operating in the new energy vehicle market segments;

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to forecast the size and development potential of the Chinese new energy vehicle industry and market towards 2025;

to discuss valuable enlightenment for those economies that attempt to rapidly develop new energy vehicle industry and policy recommendations;

to recommend useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market; and

to ultimately give conclusions.

## SCOPE OF THE REPORT

Chapter 2. An Overview of China’s New Energy Vehicle Industry

An overview of China’s new energy vehicle industry and development course of China's new energy vehicle industry are elaborated in detail, which covered 'The First Stage (2001–2007): Preliminary Stage, The Second Stage (2008–2013): Rearing Stage, The Third Stage (2014–2018): Rapid Growth Stage, The Fourth Stage (2019–2025): Market-driven Growth Stage'.

Chapter 3. Chinese Government-led Strategies and Policies Promoting New Energy Vehicle Industry

The entire set of the Chinese government-led strategies and policies promoting new energy vehicle industry are expounded comprehensively and in detail, which covered the “Chinese Government-led Strategies and Policies Promoting New Energy Vehicle Industry in the Preliminary Stage (2001–2007)”, the “Chinese Government-led Strategies and Policies Promoting New Energy Vehicle Industry in the Rearing Stage (2008–2013)”, the “Chinese Government-led Strategies and Policies Promoting New Energy Vehicle Industry in the Growth Stage (2014–2018)” and the “Chinese Government-led Strategies and Policies Promoting New Energy Vehicle Industry in the Market-driven Growth Stage (2019–2025)”, including the detailed “China's Central Government Fiscal Subsidy Policies and Technical Standards for Popularization and Application of New Energy Vehicles”.

Chapter 4. Analysis and Research on the Chinese Government-led Strategies and

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Policies Promoting New Energy Vehicle Industry

The research report investigated Chinese government-led strategies and policies promoting the new energy vehicle industry and revealed the pros and cons of the Chinese Government-led strategies and policies promoting the new energy vehicle industry.

Chapter 5. A Panorama of China’s New Energy Vehicle Market and Industry

By virtue of a series of graphs and tables exhibited the dynamic growth panorama of the production volume and sale volume of China's new energy vehicles from 2011 to 2019, which covered the “Panorama of Production Volume and Sale Volume of China's Pure Electric Vehicles”, the “Panorama of Production Volume and Sale Volume of China's Plug-in Hybrid Vehicles”, the “Panorama of Production Volume and Sale Volume of China's Fuel Cell Vehicles” and the “Position of Chinese New Energy Vehicle Brands in Global Sales”.

Chapter 6. A Panorama of China’s New Energy Vehicle Industrial Chain

By virtue of a graph exhibited “A Panorama of China’s New Energy Vehicle Industrial Chain and Leading Manufacturers at Upstream, Midstream, and Downstream”, which covered 27 leading manufacturers at upstream, midstream, and downstream.

Chapter 7. Chinese Top Players in New Energy Vehicle Market

The research report made full and accurate research and analysis for 27 leading manufacturers at upstream, midstream, and downstream for China’s New Energy Vehicle Industrial Chain to reveal their competitive advantage, development strategy and plan.

Chapter 8. Projections for Size of Chinese New Energy Vehicle Market and Industry for 2020 to 2025

By virtue of reasonable assumptions and simulation models, the projections for size of Chinese New Energy Vehicle Market and Industry from 2020 to 2025 showed that the total sale volume of new energy vehicles is estimated to be at about 1.022 million units in 2020 and is anticipated to expand at a CAGR (Compound Annual Growth Rate) of 22.05% from 2021 to 2025; the total output volume of new energy vehicles is estimated to be at about 1.081 million units in 2020, and is anticipated to grow at a CAGR of

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22.32% from 2021 to 2025.

Chapter 9. Valuable Enlightenment and Useful Knowledge

Firstly, the research report made a comparison of both the largest new energy vehicle markets in the world between the China and the United States to reveal unique features of the Chinese government-led strategies and policies promoting the new energy vehicle industry.Then revealed the the plentifully valuable enlightenment for those economies that attempt to rapidly develop new energy vehicle industry. This research report proposed the useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in Chinese new electric vehicle market, which covered (I)Opportunities and Challenges, (II)Market Entry Strategies, (III) How compliance with the Chinese Market Rules to guide those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market successfully enter into mainland China and smoothly operate business in mainland China.

Chapter 10. Conclusion

Since 2001, by virtue of government-led strategies and policies, generous fiscal incentives, preferential tax, science and technological inputs, and demonstration for new energy vehicle popularization and application, as well as administrative order instructed the government and public organizations procuring new energy vehicles for public fields, China government cultivated a prosperous new energy vehicle market and a powerful new energy vehicle industry. China played a catch-up actor in the new energy vehicle industry and has achieved its goal of overtaking in curves. The Chinese government-led strategies and policies promoting the new energy vehicle industry are implicated the plentifully valuable enlightenment for those economies that attempt to rapidly develop new energy vehicle industry as well as the useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market, althorght these government-led strategies and policies exist the disadvantages.

China is opening its door more and more up to foreign capitals and foreign companies, which bring the excellent business opportunities for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market. China with population of 1.4 billion is a largest market in the world. Its new energy vehicle market has significant demand growth potentiality.The rapid development of China’s new energy vehicle market is creating tremendous business opportunities for

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power batteries related companies, new energy vehicle component manufacturers, new energy vehicle makers, charging infrastructure manufacturers and service providers, especially those high-tech innovative companies and start-up companies with the high quality products and global top automobile manufacturing giants. The power batteries with high energy density and high safety, the efficient integrated powertrain systems, the advanced fuel cell products, the new energy self-driving vehicles linking the 'Internet of Vehicle', and 'Internet of Vehicle' technology are the subsectors to be prioritised in the near future that are in the eyes of Chinese regulatory authorities.

The overseas high-tech innovative companies and startup companies with the high quality products can use their products to knock on the door of the Chinese market, or to set up a physical base in mainland China through forming a Joint venture (JV) with Chinese partners, the global top automobile manufacturing giants can create a subsidiary in mainland China. Those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market can choose the most suitable market entry strategy depending on their advantages and capability.

## REASONS TO BUY

Currently, COVID-19 epidemic is changing tendency and scale of global new energy vehicle market and industry in the foreseeable future. Combining the impacts of COVID-19 epidemic, the Chinese strategies and policies on new energy vehicle industry and market with projections for 2020 to 2025, the research report examined and analyzed the effects of Chinese government-led strategies and policies promoting the new energy vehicle industry, investigated the development of the Chinese entire new energy vehicle industry and the entire new energy vehicle market segments, revealed the pros and cons of the Chinese Government-led strategies and policies promoting the new energy vehicle industry. Its aim is to provide valuable enlightenment and policy recommendations for those economies that attempt to rapidly develop new energy vehicle industry and useful knowledge for those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market. It is an essential resource for overseas audiences to understand comprehensive knowledge of China’s government strategies and policies promoting electric vehicle industry and holistic electric vehicles market. Those economies that attempt to rapidly develop new energy vehicle industry, as well as those overseas automakers and component manufacturers that attempt to enter into competition in the Chinese market must understand how do the transformation of the Chinese government’s strategies and policies promoting the new energy vehicle industry will affect the tendency of the new energy vehicle industry and overall new energy vehicle market in the foreseeable future.

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It analyzed the China's strategies and policies promoting new energy vehicle industry, the China’s entire new energy vehicle industrial chain and the China's top players in the new energy vehicle market, predicted the sizes of the Chinese holistic new energy vehicle market and industry from 2020 to 2025, and impacts of COVID-19 epidemic on China's new energy vehicle market and industry.

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## COMPANIES MENTIONED

(I) Leading Manufacturers in Segments at Upstream for China’s New Energy Vehicle Industrial Chain
Huayou Cobalt Co.,Ltd. (Huayou)
Gem Co.,Ltd. (GEM)
Shanshan Co., Ltd. (NBSS)
Tianqi Lithium Corporation (Tianqi Lithium)

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Ganfeng Lithium Co., Ltd. (Ganfeng Lithium)
Easpring Material Technology Co.,Ltd. (Easpring)
Putailai New Energy Technology Co.,Ltd.( Putailai)
China Baoan Group Co., Ltd. (CBG)
Tinci Materials Technology Co.,Ltd. (TINCI)
Capchem Technology Co., Ltd. (CAPCHEM)
Guotai International Group Co., Ltd. (JSGT)
Shanghai Energy New Material Technology Co., Ltd. ( SEM CORP)
Senior Technology Material Co., Ltd.(Senior)
(II) Leading Manufacturers in Segments at Midstream for China's New Energy Vehicle Industrial Chain
Contemporary Amperex Technology Co., Ltd.(CATL)
Guoxuan High-Tech Co., Ltd (GXHT)
Broad-Ocean Motor Co., Ltd. (BROAD-OCEAN MOTOR)
Inovance Technology Co., Ltd. (Inovance)
CRRC TIMES ELECTRIC VEHICLE CO., LTD. (CRRC Electric Vehicle)
(III) Leading Manufacturers in Segments at Downstream for China's New Energy Vehicle Industrial Chain
Byd Company Limited. (BYD)
BAIC BluePark New Energy Technology Co., Ltd. (BAIC Electric Vehicle)
Saic Motor Corporation Limited. (SAIC MOTOR )
Yutong Bus Co.,Ltd. (Yutong Bus)
Zhongtong Bus Holding Co.,Ltd. (Zhongtong Bus)
Dongfeng Automobile Co.Ltd. (DFAC)
Foton Motor Co.,Ltd.( FOTON)
Tgood Electric Co., Ltd. (TGOOD) and its subsidiary TELD New Energy Co., Ltd.
Star Charge (Star Charge).

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