

China Charging Station and Charging Pile Market Report, 2015-2016

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Abstracts

In 2013, the good sales of Tesla's Model S set off a global wave of new energy vehicles. Various technologies mushroomed in 2014 after many years of accumulation. Automakers, including Germany-based BMW and Audi, Japan-based Toyota and Nissan, the US-based General Motors and Tesla, China-based BYD and Roewe, launched a series of new energy vehicle models in 2014, marking the initial prevalence of new energy vehicles.

In 2014, China produced 78,000 and sold 75,000 new energy vehicles, up 350% and 320% respectively from the previous year. Wherein, the output and sales volume of BEV were 49,000 and 45,000 respectively, rising by 240% and 210% separately from last year; the output and sales volume of PHEV amounted to 29,900 and 29,700 separately, jumping by 810% and 880% year on year each. In 2014, 23.4919 million (up 6.9% year on year) cars were sold in the Chinese market, including 74,763 new energy vehicles which occupied 0.32% (increasing by 300% from the previous year).

Shored by the rapid development of new energy vehicles, charging stations and piles will be growing by leaps and bounds. In 2010-2014, the number of Chinese charging stations jumped from 76 to 723 at the CAGR of 75.6%, and the number of charging piles ascended from 1,122 to 28,000 with the CAGR of 123.5%.

The charging station market pattern dominated by State Grid Corporation of China and China Southern Power Grid has taken shape. As of the end of 2014, State Grid had built 24,000 electric vehicle charging piles, 650 charging and swap stations, a smart charging and swap network of demonstration project in Zhejiang province and Suzhou-Shanghai-Hangzhou Intercity Project (Phase I); China Southern Power Grid had completed 3,528 charging piles, 118 charging and swap stations and focused on the

construction of smart charging and swap network in the Pearl River Delta. In addition, Sinopec, CNPC and CNOOC also set up a small number of refueling and charging experiment stations by dint of the existing gas stations.

The report focuses on the following:

Development (industrial policies, laws and regulations) of China automotive charging station and pile industry;

Market size, market structure, supply & demand and competition pattern of China automotive charging station and pile industry;

Impact from upstream and downstream sectors on the global and China automotive charging station and pile industry;

Operation and development strategies of 10 key global and Chinese automotive charging station enterprises.

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