

China EV Charging Station and Charging Pile Market Report, 2016-2020

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Abstracts

China produced 379,000 new energy vehicles in 2015, a fourfold increase from a year ago, including 142,800 battery-electric passenger vehicles and 63,600 plug-in hybrid passenger vehicles, both increasing three times year-on-year, 147,900 battery-electric commercial vehicles, an increase of eight times from 2014, and 24,600 plug-in hybrid commercial vehicles, surging by 79% compared with the previous year. In 2015, new energy vehicles made up 1.5% of China's total output of vehicles (24.5033 million units), jumping by 400% from 2014. New energy vehicle ownership approached 500,000 units in China in 2015, 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 3,600 in 2015 at a CAGR of 90.2%. The number of public charging piles grew from 1,122 to 49,000 at a CAGR of 87.7% during the same period. In addition to public charging piles, private charging pile ownership approximated 50,000 and commercial charging piles (for buses, logistics vehicles, enterprises & public institutions) totaled about 50,000-60,000 nationwide in 2015, thus bringing the country's total number of charging piles up to nearly 160,000.

The construction of charging piles in major cities that promote new energy vehicles in China is as follows:

(1) By the end of 2015, Beijing has built 5 large battery swap stations, 518 charging stations, and 21,000 charging piles. These charging piles can be divided into three categories: 1) private ones (about 12,000); 2) public ones (5,008 or so); 3) special ones

(3,700), primarily for public buses, sanitation vehicles, taxicabs, and not open to the public.

(2) By the end of 2015, 25 state-owned and private companies in Shanghai have built 16,055 charging piles (including 5,168 public and special charging facilities) and 131 after-sales service outlets throughout the city. There were 218 public EV charging stations, 28 public charging stations, and 2,578 DC charging piles (including 630 charging piles for public buses).

As to industrial policies, China introduced a series of documents, such as the Circular on Issues Related to the Policy on Price of Electricity Used by EVs, the Circular on Rewarding the Construction of New Energy Vehicle Charging Facilities, and the Circular on Incentive Policies on New Energy Vehicle Charging Facilities and Strengthening the Popularization and Application of New Energy Vehicles during the 13th Five-year Plan Period (Exposure Draft), encouraging the construction of charging piles and allocating central fiscal funds to subsidize the provinces and enterprises which construct and operate charging piles in a sound way so as to stimulate enthusiasm of the society to participate in the construction of charging piles.

China aims to build 12,000 centralized charging/battery swap stations and 4.8 million scattered charging piles across the country by 2020 to meet charging demand of 5 million EVs in principle of 1 vehicle to 1 charging pile. Regionally, the EV charging stations that have been built are primarily concentrated in eastern provinces in East China, North China, and South China, of which Beijing, Shanghai, and Qingdao are the cities with massive construction of EV charging stations in China.

With introduction of incentive policies on charging facilities, all parts of the countries have ramped up their efforts to build charging piles, and the companies that run charging pile business also announce to build tens of thousands of charging piles in Beijing, Shanghai, and Guangzhou. Operators of charging facilities, manufacturers of equipment, and providers of integrated solutions are three major roles in charging pile industry chain. There are three main business models in charging pile industry: “charging pile + commodity retail + service consumption”, “carmakers + equipment manufacturers + operators + users”, and “charging APP + cloud services + remote intelligent management”.

China EV Charging Station and Charging Pile Market Report, 2016-2020 by ResearchInChina highlights the followings:

Industrial policies on car charging station/pile, including policies on subsidies for

new energy vehicles, policies on subsidies and rewards for construction of charging piles, the planning for promotion of new energy vehicles, 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 vehicles, buses, logistic vehicles) in China;

Development characteristics of charging pile globally, covering policies on subsidies for charging pile in major countries, in-depth analysis of charging port standards (America's SAE, Europe's ICE, Japan's CHAdeMO, and China's GB/T), and study of mainstream charging equipment and operators;

Development of car charging station/pile industry in China, including analysis of 5-year planning for construction of charging pile, particularly profit models and crowdfunding models of charging pile, and driving habits and charging behaviors of new energy vehicle users;

Construction of charging piles in more than 30 provinces and cities by the end of 2015 and construction plans

13 global and Chinese charging operators (operating models, profit models, APP, partners);

Operation and development strategies of 8 Chinese suppliers of car charging equipment;

Major Chinese carmakers' strategic layout in charging field and cooperation with charging equipment suppliers and charging operators.

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