

# China Electric Vehicle Industry Report, 2014-2015

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## Abstracts

2014 may be called the “first year” of the development of Chinese electric vehicles, with annual sales reaching 74,763, 3.2 times higher than in 2013. With the ascent in the global electric vehicle market, China becomes the second largest market in the world after the United States, eyeing 23.5% market share. Among the top 20 most popular models in 2014, BYD Qin, Kandi K10, Chery QQ3 EV, Zotye E20, BAIC E150 EV and BYD e6 came from China, representing a combined 15.3% share of total sales in the global market.

In terms of market segments:

Almost 34,000 Chinese BEV passenger cars were sold in 2014, surging by 190% year on year; popular models were, in order, Chery QQ3EV, Zotye E20, BAIC E150 EV, BYD E6, JAC iEV4, and Zotye Cloud 100 with their market share totaling as high as 85%. BEV as the ultimate goal of China’s new energy vehicle development will still see new models launched by companies for participation in market competition.

In 2014, China recorded PHEV passenger car sales of 17,500, 123 times that in 2013. In today’s Chinese PHEV passenger car market, there are mainly BYD Qin and Roewe 550 plug-in with the former holding a dominant position with sales of 14,747. In 2015, Chang’an Automobile, Dongfeng Motor, GAC, Volvo, etc. are planning to launch PHEV models, which will intensify market competition. At the same time, companies affected by the policy are expected to turn to the development of EREV (extended range electric vehicle) models.

In the aspect of corporate development, Zotye, BYD, BAIC, Kandi, etc. have made plans for electric car sales target and models in 2015. Among them, Zotye shows the highest target of 80,000 in sales by continuing to rely on its two main models i.e. E20 and Cloud 100 with 50,000 and 30,000, respectively.

As the biggest winner in China's EV market, BYD sold an accumulative of 20,972 electric cars in 2014, with its market share rising to 28.05%; there are mainly Qin (plug-in), E6 (BEV) and DENZA (BEV, a joint venture brand) in passenger vehicle market, K9 (battery-electric bus) and J9 (heavy battery-electric truck) in commercial vehicle market. In 2015, BYD continues to focus on the passenger vehicle market by launching Tang (Q1, mid-size SUV), Shang (Q2, MPV), Song (Q3, compact SUV) and Yuan (Q4, small SUV) quarter by quarter.

Kandi, a dark horse in China's EV market, obtained the qualification for producing electric cars with the help of Geely Automobile. In 2014, it posted sales of 10,935, second only to BYD. Concerning its two EV models i.e. Mini K10 and Panda K11, the former is self-produced by Kandi while the latter in the light of Geely Panda. In July 2013, Kandi and Geely were pioneered in China's "micro-bus" mode in Hangzhou and promoted the business model of by-hour lease which was later copied to Shanghai, Chengdu, Nanjing, Guangzhou, Wuhan, Changsha, Changzhou, etc. in succession. By the end of 2014, Kandi's micro-bus project has launched a total of 14,398 electric cars.

The New BEV Passenger Car Production Enterprise Investment Projects and Rules on the Production Admission Administration has completed opinion collection in March 2015 and is expected to be introduced within the year. In accordance with the opinion draft, there is hope of loosening electric car production qualification in China, Then parts manufacturing firms (e.g. Wanxiang), internet companies (e.g. Letv), low-speed electric car companies (e.g. Yogomo) and other non-traditional car companies are likely to get the electric car production license, and Chinese electric vehicle market will present the characteristics of diversification.

The report highlights the followings:

Policy environment for China's electric vehicle market;

Global and China's electric vehicle market sales, and sales of main models;

China's electric vehicle market structure and competition pattern;

Sales, main models, and import market of two segments i.e. BEV passenger car and PHEV passenger car in China;

Major companies in China's electric car infrastructure and key components;

Development of electric vehicle demonstration cities in China;

EV development, products, sales, development strategy, etc. of major companies in China.

## Contents

### **1. OVERVIEW OF ELECTRIC VEHICLE INDUSTRY**

#### 1.1 Introduction and Classification of Electric Vehicle

##### 1.1.1 Introduction

##### 1.1.2 Classification

##### 1.1.3 Technology Roadmap

#### 1.2 Industry Chain

### **2. POLICY ENVIRONMENT FOR ELECTRIC VEHICLE INDUSTRY**

#### 2.1 Fiscal Subsidy Policy

#### 2.2 Demonstration & Promotion Policy

#### 2.3 Preferential Tax Policy

#### 2.4 Production Permission Policy

### **3. ELECTRIC VEHICLE MARKET**

#### 3.1 Sales Volume

##### 3.1.1 Global

##### 3.1.2 China

##### 3.1.3 Comparison between China and Foreign Countries

#### 3.2 Competition Pattern

#### 3.3 Market Structure

#### 3.4 Import Market

##### 3.4.1 BEV

##### 3.4.2 PHEV

#### 3.5 Infrastructure

##### 3.5.1 Charging Station

##### 3.5.2 Charging Pile

##### 3.5.3 Development Planning

#### 3.6 Key Parts

##### 3.6.1 Battery

##### 3.6.2 Motor

##### 3.6.3 Inverter

##### 3.6.4 IGBT

### **4. CHINA ELECTRIC PASSENGER VEHICLE MARKET**

#### 4.1 BEV Passenger Car

##### 4.1.1 Sales Volume

##### 4.1.2 Release

##### 4.1.3 Competition Pattern

#### 4.2 PHEV Passenger Car

##### 4.2.1 Sales Volume

##### 4.2.2 Release

##### 4.2.3 Competition Pattern

### **5. ELECTRIC VEHICLE DEMONSTRATION CITY**

#### 5.1 Municipality

##### 5.1.1 Beijing

##### 5.1.2 Tianjin

##### 5.1.3 Shanghai

##### 5.1.4 Chongqing

#### 5.2 Urban Agglomeration

##### 5.2.1 Hebei Urban Agglomeration

##### 5.2.2 Zhejiang Urban Agglomeration

##### 5.2.3 Fujian Urban Agglomeration

##### 5.2.4 Jiangxi Urban Agglomeration

##### 5.2.5 Guangdong Urban Agglomeration

##### 5.2.6 Guizhou Urban Agglomeration

##### 5.2.7 Yunnan Urban Agglomeration

##### 5.2.8 Inner Mongolia Urban Agglomeration

##### 5.2.9 Jiangsu Urban Agglomeration

##### 5.2.10 Chang-Zhu-Tan Region

#### 5.3 Other Cities

##### 5.3.1 Hefei (Anhui Province)

##### 5.3.2 Wuhu (Anhui Province)

##### 5.3.3 Taiyuan (Shanxi Province)

##### 5.3.4 Jincheng (Shanxi Province)

##### 5.3.5 Zhengzhou (Henan Province)

##### 5.3.6 Xinxiang (Henan Province)

##### 5.3.7 Wuhan (Hubei Province)

##### 5.3.8 Xiangyang (Hubei Province)

##### 5.3.9 Guangzhou (Guangdong Province)

##### 5.3.10 Shenzhen (Guangdong Province)

- 5.3.11 Qingdao (Shandong Province)
- 5.3.12 Zibo (Shandong Province)
- 5.3.13 Linyi (Shandong Province)
- 5.3.14 Weifang (Shandong Province)
- 5.3.15 Liaocheng (Shandong Province)
- 5.3.16 Dalian (Liaoning Province)
- 5.3.17 Shenyang (Liaoning Province)
- 5.3.18 Changchun (Jilin Province)
- 5.3.19 Harbin (Heilongjiang Province)
- 5.3.20 Haikou (Hainan Province)
- 5.3.21 Chengdu (Sichuan Province)
- 5.3.22 Luzhou (Sichuan Province)
- 5.3.23 Xi'an (Shaanxi Province)
- 5.3.24 Lanzhou (Gansu Province)
- 5.3.25 Kunming (Yunnan Province)
- 5.3.26 Ningbo (Zhejiang Province)

## **6. MAJOR ELECTRIC VEHICLES MANUFACTURERS IN CHINA**

- 6.1 SAIC Motor
  - 6.1.1 Profile
  - 6.1.2 Operation
  - 6.1.3 Electric Vehicle Products
  - 6.1.4 Electric Vehicle Sales
  - 6.1.5 Strategy for Electric Vehicle Development
- 6.2 FAW Group
  - 6.2.1 Profile
  - 6.2.2 Operation
  - 6.2.3 Electric Vehicle Products
  - 6.2.4 Strategy for Electric Vehicle Development
  - 6.2.5 FAW Car
  - 6.2.6 FAW Haima
  - 6.2.7 FAW Toyota
  - 6.2.8 FAW-Volkswagen
- 6.3 Dongfeng Motor Corporation
  - 6.3.1 Profile
  - 6.3.2 Operation
  - 6.3.3 Electric Vehicle Products
  - 6.3.4 Strategy for Electric Vehicle Development

## 6.4 BYD

### 6.4.1 Profile

### 6.4.2 Operation

### 6.4.3 Electric Vehicle Products

### 6.4.4 Electric Vehicle Sales

### 6.4.5 Model Planning

### 6.4.6 Strategic Layout

### 6.4.7 Overseas Market

### 6.4.8 DENZA

## 6.5 Chang'an Automobile

### 6.5.1 Profile

### 6.5.2 Operation

### 6.5.3 Electric Vehicle Products

### 6.5.4 Strategy for Electric Vehicle Development

## 6.6 Chery Automobile

### 6.6.1 Profile

### 6.6.2 Operation

### 6.6.3 Electric Vehicle Products

### 6.6.4 Strategy for Electric Vehicle Development

### 6.6.5 by iVokaOS

## 6.7 Geely Automobile

### 6.7.1 Profile

### 6.7.2 Operation

### 6.7.3 Electric Vehicle Products

### 6.7.4 Joint Ventures

### 6.7.5 Strategy for Electric Vehicle Development

## 6.8 BAIC Group

### 6.8.1 Profile

### 6.8.2 Operation

### 6.8.3 Electric Vehicle Products

### 6.8.4 Electric Vehicle Sales

### 6.8.5 Planning for Electric Vehicle Development

### 6.8.6 Joint Ventures

## 6.9 GAC Group

### 6.9.1 Profile

### 6.9.2 Operation

### 6.9.3 Electric Vehicle Products

### 6.9.4 Strategy for Electric Vehicle Development

## 6.10 Brilliance Auto

- 6.10.1 Profile
- 6.10.2 Operation
- 6.10.3 Electric Vehicle Products
- 6.10.4 Strategy for Electric Vehicle Development
- 6.11 Great Wall Motors
  - 6.11.1 Profile
  - 6.11.2 Operation
  - 6.11.3 Electric Vehicle Products
  - 6.11.4 Strategy for Electric Vehicle Development
- 6.12 JAC Motors
  - 6.12.1 Profile
  - 6.12.2 Operation
  - 6.12.3 Electric Vehicle Products
  - 6.12.4 Strategy for Electric Vehicle Development
- 6.13 Kandi
  - 6.13.1 Profile
  - 6.13.2 Operation
  - 6.13.3 Electric Vehicle Products
  - 6.13.4 Strategy for Electric Vehicle Development
- 6.14 Zotye
  - 6.14.1 Profile
  - 6.14.2 Electric Vehicle Products
  - 6.14.3 Strategy for Electric Vehicle Development

## **7. MARKET SUMMARY**

- 7.1 BYD Occupying the First Position
- 7.2 2015 Sales Target and Model Planning Released by Companies
- 7.3 Leasing Model Increasingly Popular
- 7.4 Joint-Venture Independent Brands Continuously Launched



## Selected Charts

### SELECTED CHARTS

Main Types of New Energy Vehicle

Classification of Hybrid Electric Vehicle

Technical Focal Points for Electric Vehicle in Major Countries or Regions

Technology Roadmap of New Energy Vehicle in China

Electric Vehicle Industry Chain

Comparison between China's New and Old Electric Vehicle Subsidy Policies

Public Subsidy Standards for Electric Passenger Vehicle in China, 2013-2015

Public Subsidy Standards for Electric Bus in China, 2013-2015

Public Subsidy Standards for Electric Passenger Vehicle in China, 2016

Public Subsidy Standards for Electric Bus in China, 2016

List of First-Batch New Energy Vehicle Promotion & Application Cities/Regions

List of Second-Batch New Energy Vehicle Promotion & Application Cities/Regions

China's New Energy Vehicle Demonstration City Promotion Plan, 2014-2015

Comparison between ICE and EV Taxes in China

Catalogue of First-Batch New-energy Vehicles Exempt from Purchase Tax

Catalogue of Second-Batch New-energy Vehicles Exempt from Purchase Tax

Catalogue of Third-Batch New-energy Vehicles Exempt from Purchase Tax

Global Electric Vehicle Sales, 2011-2018E

Top 20 Global Electric Vehicle Sales, 2014

China's Electric Vehicle Sales, 2011-2018E

% of China's Electric Vehicle in, 2011-2014

Proportion of China's Electric Vehicle in Auto Market, 2011-2014

Proportion of American Electric Vehicle in Auto Market, 2011-2013

Comparison between Chinese and American Electric Vehicle Sales, 2011-2014

China's Mainstream Electric Vehicle Sales Ranking, 2014

China's Electric Vehicle Market Structure by Power Type, 2011-2018E

China's Electric Vehicle Market Structure by Model, 2011-2018E

Import Volume of China's Main BEV Passenger Cars, 2014-2015

Imported BEV Planned to Enter the Chinese Market (Including Those Launched)

Imported PHEV (Including Range-extended) Planned to Enter the Chinese Market  
(Including Those Launched)

Foreign PHEV Planned to Be Made in China

Number of EV Charging Stations in China, 2010-2014

Number of EV Charging Stations in Major Cities of China, 2014

Number of EV Charging Piles in China, 2010-2014

Number of EV Charging Piles in Major Cities of China, 2014  
Planning for State Grid EV Charging Station Construction, 2009-2020  
Major Power Lithium Battery Companies in China  
Major Drive Motor Companies in China and Their Customers  
Major EV Inverter Companies in China  
Major EV IGBT Companies Worldwide  
China's BEV Passenger Car Sales, 2013-2018E  
Release of Major Chinese BEV Passenger Cars  
China's BEV Passenger Car Sales by Model, 2012  
China's BEV Passenger Car Sales by Model, 2013  
China's BEV Passenger Car Sales by Model, 2014  
China's PHEV Passenger Car Sales, 2013-2018E  
Release of Major Chinese BEV Passenger Cars  
China's PHEV Passenger Car Sales by Model, 2013  
China's PHEV Passenger Car Sales by Model, 2014  
Automobile Production and Sales of SAIC Motor, 2010-2015E  
Revenue and Net Income of SAIC Motor, 2010-2014  
Gross Margin of SAIC Motor, 2010-2014  
Revenue of SAIC Motor by Product, 2010-2014  
Gross Margin of SAIC Motor by Product, 2010-2014  
Main Electric Vehicle Products of SAIC Motor and Its Joint Ventures  
Electric Vehicle Production and Sales of SAIC Motor, 2012-2015E  
Planning for SAIC Roewe Electric Vehicles  
Automobile Production and Sales of FAW Group, 2010-2015E  
Revenue of FAW Group, 2009-2013  
Main Electric Vehicle Products of FAW Group and Its Joint Ventures  
Production and Sales of Dongfeng Motor, 2010-2015E  
Revenue and Net Income of Dongfeng Motor, 2010-2014  
Gross Margin of Dongfeng Motor, 2010-2014  
Revenue of Dongfeng Motor by Product, 2010-2014  
Gross Margin of Dongfeng Motor by Product, 2010-2014  
Main Electric Vehicle Products of Dongfeng Motor and Its Joint Ventures  
Automobile Production and Sales of BYD, 2010-2015E  
Revenue, Net Income and Gross Margin of BYD, 2010-2014  
Gross Margin of BYD, 2010-2014  
Revenue of BYD by Product, 2010-2014  
Gross Margin of BYD by Product, 2010-2014  
Main Electric Vehicle Products of BYD  
Electric Vehicle Sales of BYD, 2013-2018E

Electric Vehicle Sales Structure of BYD, 2014  
Supply Chain of Core Parts for BYD Electric Vehicle  
Planning for BYD Electric Vehicle Model, 2015  
Production and Sales of Chang'an Automobile, 2010-2015E  
Revenue and Net Income of Chang'an Automobile, 2010-2014  
Net Income of Chang'an Automobile, 2010-2014  
Total Assets, Revenue and Net Income of Chongqing Changan New Energy  
Automobile, 2009-2013  
Main Electric Vehicle Products of Chang'an Automobile  
Production and Sales of Chery Automobile, 2010-2015E  
Main Electric Vehicle Products of Chery Automobile  
Electric Vehicle Production and Sales of Chery Automobile, 2011-2015E  
Automobile Production and Sales of Geely, 2010-2015E  
Revenue and Net Income of Geely, 2009-2014  
Main Electric Vehicle Products of Geely  
Automobile Production and Sales of BAIC Group, 2010-2015E  
Revenue and Total Profit of BAIC Group, 2009-2014  
Main Electric Vehicle Products of BAIC Group  
Production and Sales of BAIC E150 EV, 2012-2015E  
Corporate Structure of BAIC BJEV  
Automobile Production and Sales of GAC Group, 2010-2015E  
Revenue and Net Income of GAC Group, 2011-2014  
Gross Margin of GAC Group, 2011-2014  
Main Electric Vehicle Products of GAC Group  
Production and Sales of Brilliance Auto, 2010-2015E  
Revenue of Brilliance Auto, 2012-2014  
Main Electric Vehicle Models of Brilliance Auto  
Production and Sales of Great Wall Motors, 2010-2015E  
Revenue and Net Income of Great Wall Motors, 2010-2014  
Gross Margin of Great Wall Motors, 2010-2014  
Main Electric Vehicle Models of Great Wall Motors  
Production and Sales Volume of JAC Motors, 2010-2015E  
Revenue and Net Income of JAC Motors, 2010-2014  
Gross Margin of JAC Motors, 2010-2014  
Main Electric Vehicle Products of JAC Motors  
Ownership Structure of Kandi  
Financial Indicators of Kandi, 2012-2014  
Automobile Sales of Kandi, 2010-2014  
Main Electric Vehicle Products of Kandi

Kandi Electric Micro-bus Layout in China  
Automobile Production and Sales of Zotye, 2010-2015E  
Electric Vehicle Market Share of Major Companies in China, 2014  
Electric Vehicle Sales and Model Planning of Major Companies in China, 2015  
Major Electric Vehicle Rental Cases in China  
Joint-Venture Independent Electric Vehicle Brands in China

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