

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.

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