

Research Report on Electric Vehicle Industry in China, 2017-2021

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Abstracts

Description

In terms of the development trend of current technologies and vehicle driving principles, electric vehicles can be divided into three categories: battery electric vehicles, hybrid electric vehicles and fuel cell electric vehicles. Since fuel cell electric vehicles are not widely put in commercial use, electric vehicles usually refer to battery electric vehicles and hybrid vehicles.

In terms of application fields, electric vehicles can be categorized into electric passenger vehicles and electric commercial vehicles. Electric passenger vehicles include battery electric vehicles for passengers and hybrid vehicles for passengers. Electric commercial vehicles include battery electric buses and electric special vehicles. Both of these two types of commercial vehicles are driven by electricity, which generates low noise with high driving stability.

According to current electricity price and product oil price in China, battery electric vehicles spend less on operating costs than traditional oil-fueled vehicles do, with high economic efficiency. However, battery electric vehicles are weak in endurance mileage, competitive battery price, supportive infrastructure of charging stations, etc. Therefore, hybrid vehicles are more suitable for Chinese market. Hybrid vehicles can be categorized into ordinary hybrid vehicles and plug-in hybrid electric vehicles. Ordinary hybrid vehicles are those vehicles that are driven by traditional fuels and in the meanwhile are installed with storage batteries and electric motors. This design is aimed to improve low-speed power take-off and reduce fuel consumption. A plug-in hybrid vehicle (short for PHV) is a new type of hybrid vehicles, which has developed rapidly in recent years. On the one hand, this type of vehicles can be charged with plug-in battery

power. This charging battery can further serve as the driving force. On the other hand, a combustion motor also works even if the charging battery runs out. This function makes endurance ability and practicability of plug-in hybrid vehicles superior to battery electric vehicles.

From the perspective of technology, hybrid vehicles share many advantages with electric vehicles and avoid some development bottlenecks of battery electric vehicles. Hybrid vehicles are good at saving energy, reducing emission and reducing costs. The current technology of hybrid vehicles is advanced enough to avoid incremental costs and energy waste. Hybrid vehicles operate mainly based on traditional driving modes and existing infrastructure.

Since 2014, China's Central Government has spared efforts to promote plug-in hybrid vehicles as the key products. The supplement standard is set on the basis of the capacity of power batteries. This standard also applies to hybrid vehicles and battery electric vehicles that are identified and subsidized in accordance with the capacity of batteries. In order to promote the development of electric vehicles, some local Chinese governments adopt measures such as presenting vehicle licenses (highest value of over USD 10,000) and subsidies. The rapid development of China's electric vehicle industry can be attributed to supports from government policies. In 2016, the production volume of electric vehicles in China reached 517 thousand and the sales volume reached 507 thousand, accounting for more than 40% of the global market shares.

The Chinese government has set goals on the purpose of reducing air pollution and increasing the competitiveness of domestic automobile manufacturers. It hopes that electric vehicles and plug-in hybrid electric vehicles will have occupied one fifth (approximately 7 million) of the automobile sales volume in China by 2025. The government also requires that 8% of vehicles sold in China should be electric vehicles in 2018. This figure is expected to rise to 12% in 2020. It is estimated that the Chinese government will continue to directly subsidize the electric vehicle industry during 2018 and 2022, despite possible decreases in the average subsidy for each vehicle. Considering policies (e.g. vehicle purchase restrictions and traffic restrictions) issued by some local governments in China and relative low costs of electric vehicles, the CAGR of China's production and sales volume of electric vehicles is expected to remain over 15% during 2018 and 2022, far higher than the growth rate of the whole automobile industry.

Readers can acquire the following information or more through this report:

Development Environment of Electric Vehicle Industry

Supportive Policies of Chinese Government on Electric Vehicle Industry

Analysis on Supply of Electric Vehicles in China, 2013-2017

Market Demand for Electric Vehicles in China, 2013-2017

Major Electric Vehicle Manufacturers in China

Competition of Electric Vehicle Market in China

Driving Forces and Market Opportunities in China Electric Vehicle Industry

Risks and Challenges Faced by China Electric Vehicle Industry

Forecast on Supply and Demand of Electric Vehicle Market in China,
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