

China Electric Vehicle Industry Trend and Market Forecast(2009~2020)

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Abstracts

China has established itself as the world's largest automobile producer and consumer. The country, for instance, produced 18,420,000 vehicles and sold 18,510,000 vehicles in 2011. Now, China is taking an ambitious step to be a global leader in the next-generation electric car industry as well.

Although China is lacking behind to other foreign competitors in terms of technological competence in the EV and key component industries, it is endeavoring to increase its competitiveness, promoting early commercialization through trial and error. For this, China has designated new energy vehicles (BEV, PHEV, FCEV) as one of its seven new strategic industries. With aggressive government backing for the industry, China is expected to hold the central place as the largest producer and seller in the global EV market. On July, 14, 2011, the Ministry of Science and Technology of China announced a plan titled 'Development of New Energy Vehicles Industry(2011-2020)' where it set a goal of increasing the cumulative sales of new energy vehicles (excluding fuel battery cars) to about 1 million units by 2015 and 10 million units by 2020.

*BEV: Battery Electric Vehicle, PHEV: Plug-in Hybrid Electric Vehicle, FCEV: Fuel Cell Electric Vehicle)

Although these new energy vehicles are available at 2-3 times higher prices than those of existing ICE car models, they can run only about 150km (based on pure EVs) on one charge. Thus, the new energy vehicle industry involves enormous investments and requires large-scale charging infrastructure across China. Furthermore, these problems are coupled with the slow progress in the development of batteries, which are one of key components for EVs. As a result, China's sales of new energy vehicles and hybrid cars remained as low as 8,159 vehicles in 2011, despite the unwavering government

support. Among them, xEVs accounted for an extremely small portion with 0.04 of the total automobile sales.

To establish a more substantial and realistic measure, the Chinese government revised its original plan, putting forward 'Energy-saving and New Energy Automobile Industry Development Plan (2012-2020)' where it has downgraded the cumulative sales of new energy vehicles (excluding fuel battery cars) to 0.5 million units by 2015 and 5 million units by 2020. However, only 3,444 BEVs, and 81 PHEVs have been sold in the first half of 2012.

Although the Chinese government is promoting the EV industry, concentrating on new energy vehicles (BEVs, and PHEVs), its 2012 target does not seem attainable. According to SNE Research, the xEV market will shift toward the energy-saving vehicle (HEVs) market, not new energy vehicles (BEVs and PHEVs).

*HEV: Hybrid Electric Vehicle

SNE Research expects China's annual EV sales will reach 4,050,000 vehicles in 2020; as for the sales of xEVs by type, BEVs will account for 620,000 units, PHEVs 410000 units, and HEVs 3030000 units. It is forecasted that the xEV market in China will shift toward the HEV market rather than energy vehicles (BEVs and PHEVs) with BEV accounting for 15.2% in market share, PHEVs 10.1%, and HEVs 74.7%. The share of xEV is expected to increase from 0.04% in 2011 to 11.8% of the total automobile sales in China.

This report provides a comprehensive overview of the Chinese EV industry. It covers China's energy policies, projects for 7 new growth industries, regulations on fuel economy and emissions, EV development policies, EV pilot projects, and EV development programs, and the development trends of the EV industry. In addition, EV market analysis and forecast by technology type are provided.

This report presents all-inclusive data of China's EV industry trend and market, focusing on

China's policies on fossil energy and renewable energy and for the promotion of 7 new growth industries,

Regulations on fuel economy and emissions

Government's EV development policies,

Chinese government's pilot projects for dissemination of new energy vehicles,

Analysis of development trends and supply chains of EV makers, key component makers,

EV market forecast and EV battery price forecast (2009~2020)

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