



**TecAlliance E-newsletter**  
**August 2020**

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01

# Market Info

(China Mainland /  
Hongkong / Taiwan)

# China Mainland Highlight Vehicle News

## 2020 New Energy vehicle Industry Trends



### CATL new technology: battery and chassis "combined", battery life over 800 kilometers

Recently, according to relevant media reports, battery manufacturer CATL is studying a new technology that seeks to "integrate" power batteries with the chassis of electric vehicles and may allow electric vehicles to have a cruising range of more than 800 kilometers.

According to Zeng Yuqun, chairman of CATL, this technology is still in the research and development stage. Through this new technology, the range of electric vehicles may exceed 800 kilometers. According to current plans, this technology is expected to be launched before 2030.

In the eyes of many people, CATL is just a battery supplier, but in fact, the company not only focuses on the research and development, production and sales of new energy vehicle power battery systems but also committed to providing solutions for global new energy applications. Previously, Zeng Yuqun said that CATL is exploring new businesses such as battery recycling and energy storage.

In addition, CATL is cooperating with Tesla to produce a million-mile battery, which can increase the range of electric vehicles to 1 million miles, or 1.6 million kilometers.

According to relevant reports, from January to June this year, LG Chem occupied 24.6% of the global electric vehicle battery market, ranking first, an increase of 82.8% compared with the same period last year, while CATL had a 23.5% market share. Ranked second. With the follow-up of new technologies, CATL is expected to be the leader!



### Take you to understand the "black" technology in GAC Science and Technology Day

On July 28th, the 2020 GAC Technology Day with the theme of "Sense-Creating the Future" will be held online. Feng Xingya, General Manager of GAC Group, and experts in related fields from GAC Research Institute jointly released the announcement, highlighting a number of industry-leading "black" technologies.

At the press conference, it brought GAC's first hydrogen fuel cell passenger car-Aion LX Fuel Cell. The new car is a hydrogen fuel cell vehicle developed based on the GAC GEP 2.0 platform. It retains the large space, low wind resistance, and high-tech configuration of the pure electric version of Aion LX and is equipped with a hydrogen fuel cell system developed independently. It is worth mentioning that the vehicle only emits water, and the discharged water can be consumed directly! This is the real clean energy!

Graphene batteries are certainly not unfamiliar to everyone. GAC Group has been studying the large-scale preparation of graphene since 2014. It has 3DG graphene preparation technology with independent intellectual property rights and has also applied graphene materials to fast-charge lithium-ion batteries and super Capacitors, lithium-sulfur batteries, lightweight body materials and other fields.

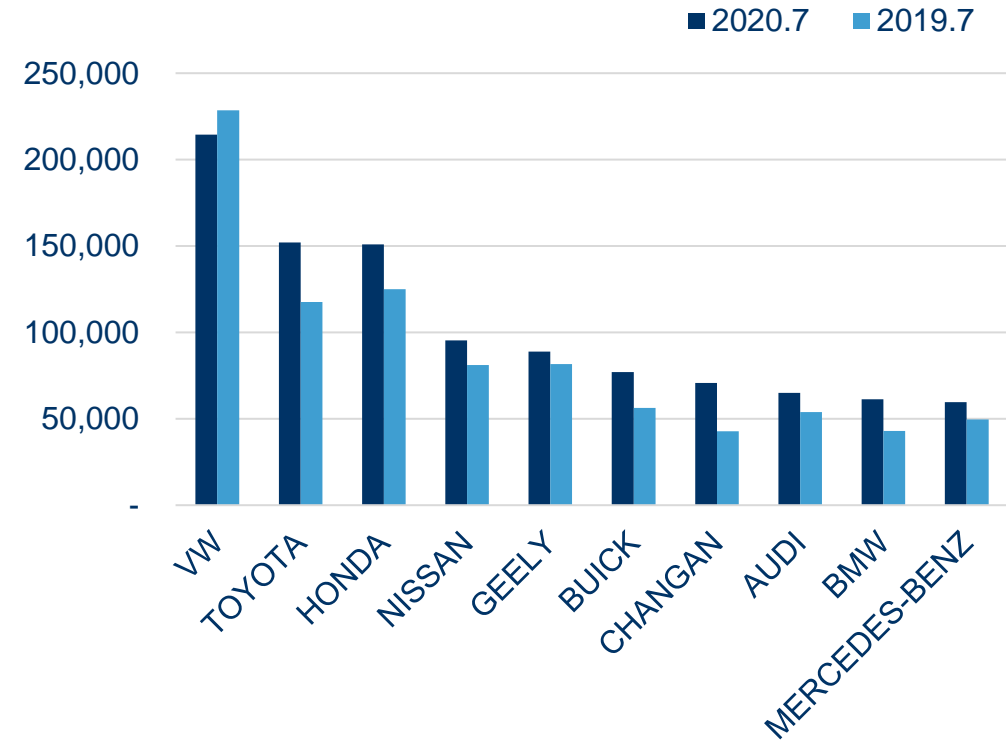
# China Mainland Highlight Vehicle News

## Top 10 Brand sales rankings in July 2020



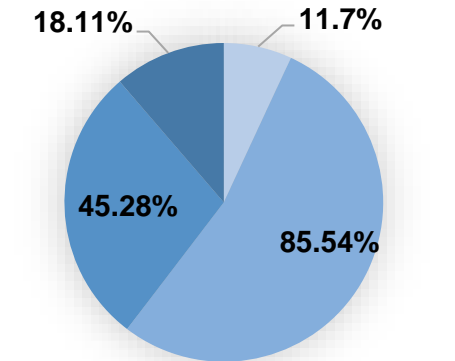
## Sales comparison

With the gradual normalization of epidemic control and the strong encouragement of government policies, the sales of vehicles in July showed a clear upward trend compared with the same period last year. Among the top ten brands, all brands except Volkswagen showed a clear increase.

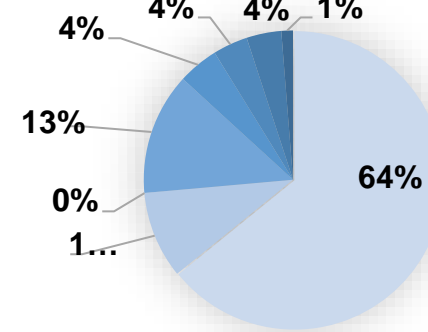


# China July New vehicle Analysis

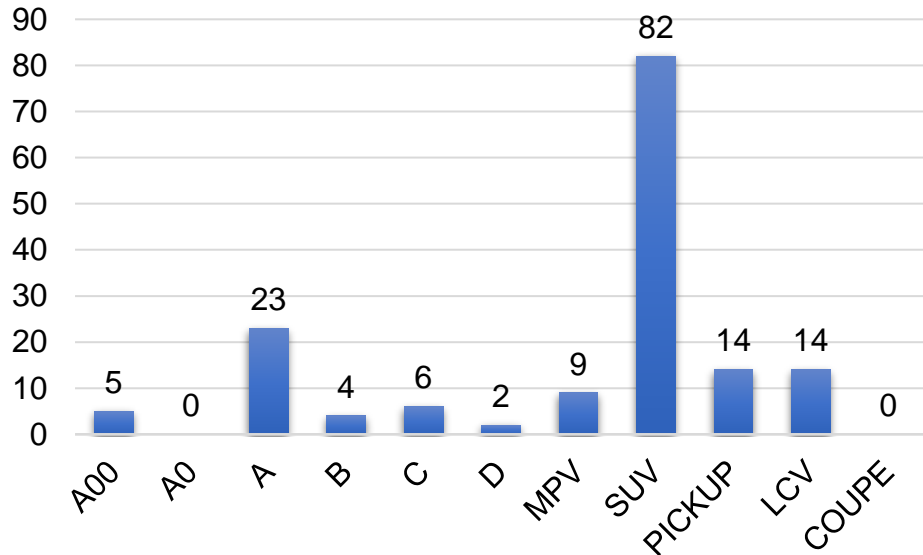
New vehicle statistics



Traditional Energy and New Energy Vehicles Statistics

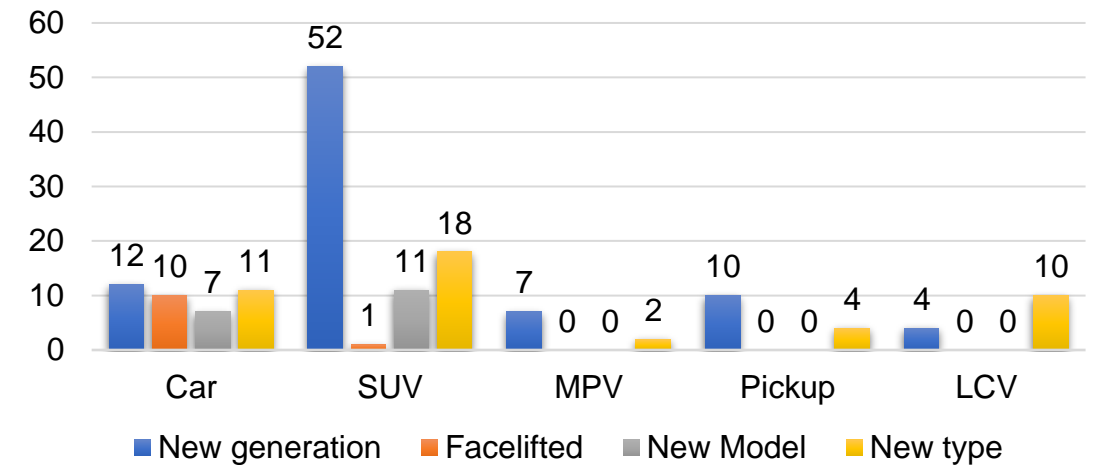


Level statistics



Legend: Petrol, Diesel, CNG, EV, HEV, PHEV, MHEV, EREV

Market segment type statistics



Remarks:

All statistical data is based on K-Type. In July 2020, the total coverage of K-Type was 159, of which 73 were New K-Type.

New model means that launched model that did not exist before.

New type means that the new displacement and power have been launched.

# Hong Kong Highlight Vehicle News

## Hong Kong May 2020 Vehicle News

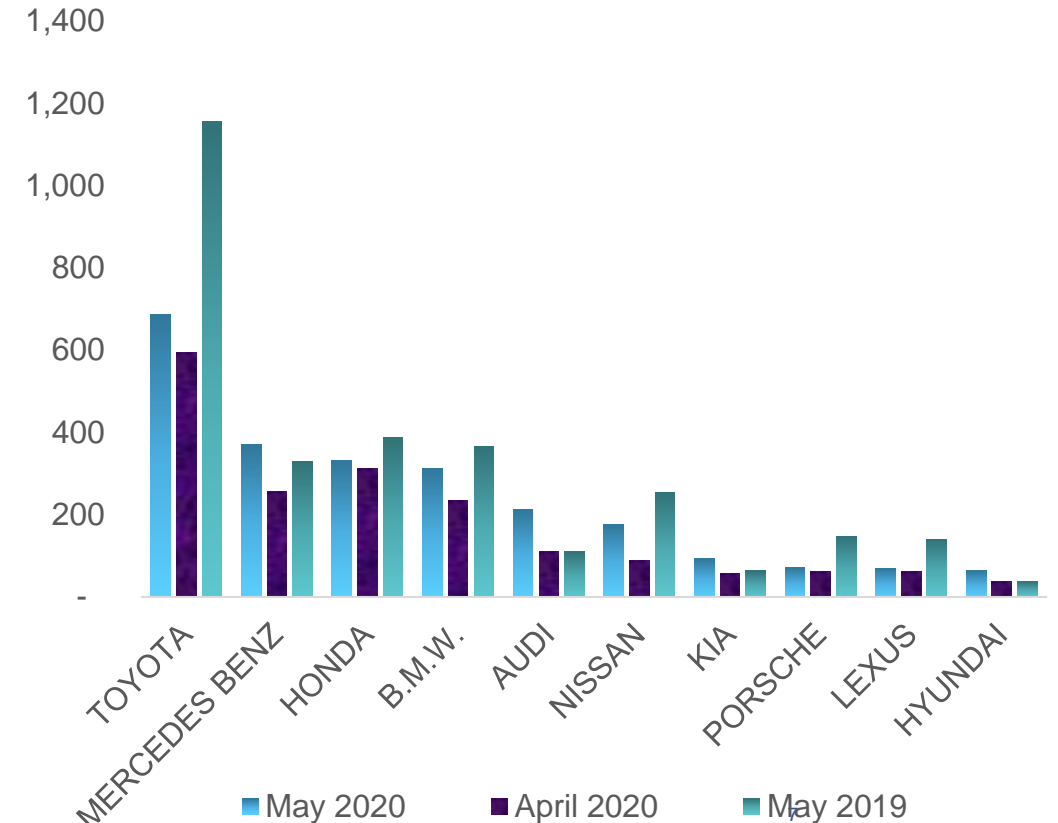
The form of the new crown epidemic in Hong Kong has slowed down, and automobile production and sales have rebounded slightly. Passenger car sales in May 2019 were 3,568 units, while sales in May 2020 were only 2,840 units, a year-on-year decrease of 20.4%. Toyota's sales in May rose 15.8% month-on-month and fell 40.5% year-on-year, but it was still the most popular automaker in Hong Kong in May. Mercedes-Benz rose one ranking from last month, ranking second, up 44.5% from the previous month. Honda ranked third in sales this month, up 6.1% from the previous month. BMW's sales increased by 33.1% from the previous month, the ranking remained unchanged, and it remained fourth. Audi has increased by 93.6% month-on-month, but it has only risen one place from the previous month, ranking fifth. The sales of the remaining brands in the top ten are basically at the monthly average level, but the year-on-year sales of the entire automobile market are on the decline.



## Hong Kong Sales Comparison

The form of Hong Kong's new crown epidemic slows down, and automobile production and sales rebound slightly.

Regardless of year-on-year or month-on-month comparison in May, Toyota is still the most popular automaker in the Hong Kong auto market and has maintained a high level in the market. Mercedes-Benz's sales rose month-on-month in May, ranking second. Honda's sales in May rose slightly from the previous month and ranked third. BMW sales also increased month-on-month in May, ranking fourth. Audi's sales this month rose significantly from last month, ranking fifth. The sales of the remaining brands are declining year-on-year. Overall, the sales of the entire automobile market rebounded slightly from last month.



# HONG KONG VIO REPORT

Hong Kong (China)



VIO until 2019 H1

VEHICLES IN OPERATION

725,478

KTYPE WITH VIO

3571

VEHICLE BRANDS

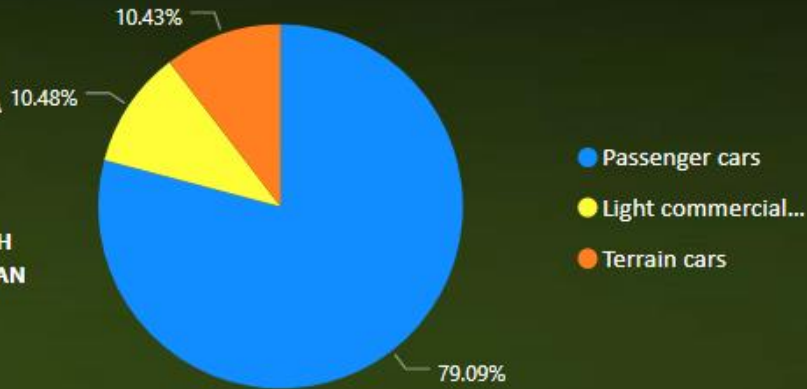
65

## VIO BY VEHICLE SEGMENTS

### INFORMATION

TERRAIN CAR(e.g. SUV & PICKUP)  
INCLUDES VEHICLES SUCH AS TOYOTA  
HILUX,SUZUKI JIMNY,BMW X5 & ETC

LIGHT COMMERCIAL VEHICLE  
INCLUDES VEHICLE<7.5 TONNES SUCH  
AS TOYOTA HIACE,HONDA ACTY,NISSAN  
NV-SERIES & ETC



## K-TYPE / VIO COVERAGE BY SEGMENT



562K  
VIO COVERED



75.6K  
VIO COVERED



69.6K  
VIO COVERED

## TOP1 VEHICLE BASED ON VIO



TOYOTA



COROLLA

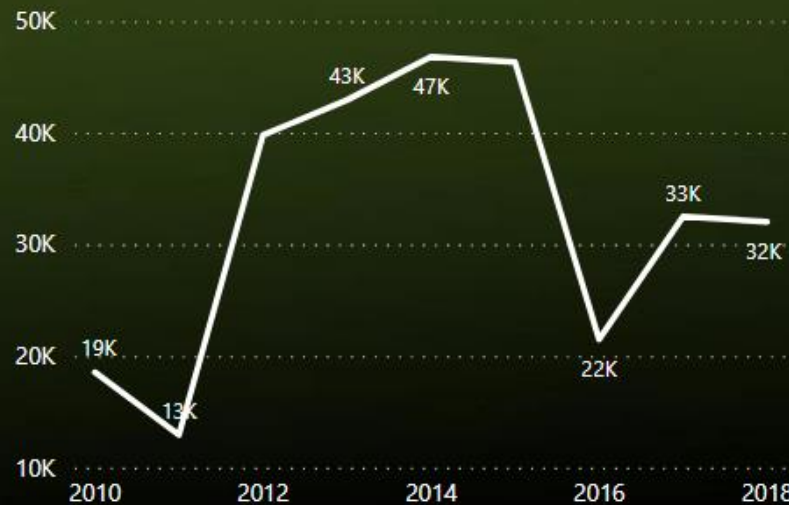
VIO OF TOP1 VEHICLE

41,631

POPULATION SHARE

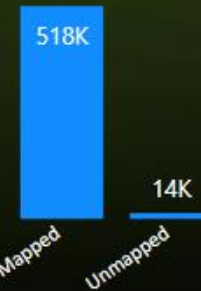
5.74%

## TREND OF ANNUAL REGISTRATION FROM 2010 TO 2018



## TOP 1000 VIO K-TYPE MAPPING

TOP 1000 VIO  
Total VIO = 73.32%



MATCH	VIO	%
Mapped	517,935	97.37%
Unmapped	14,040	2.63%

## MAP





# Taiwan Highlight Vehicle News

## Taiwan Auto Sales Report for July 2020



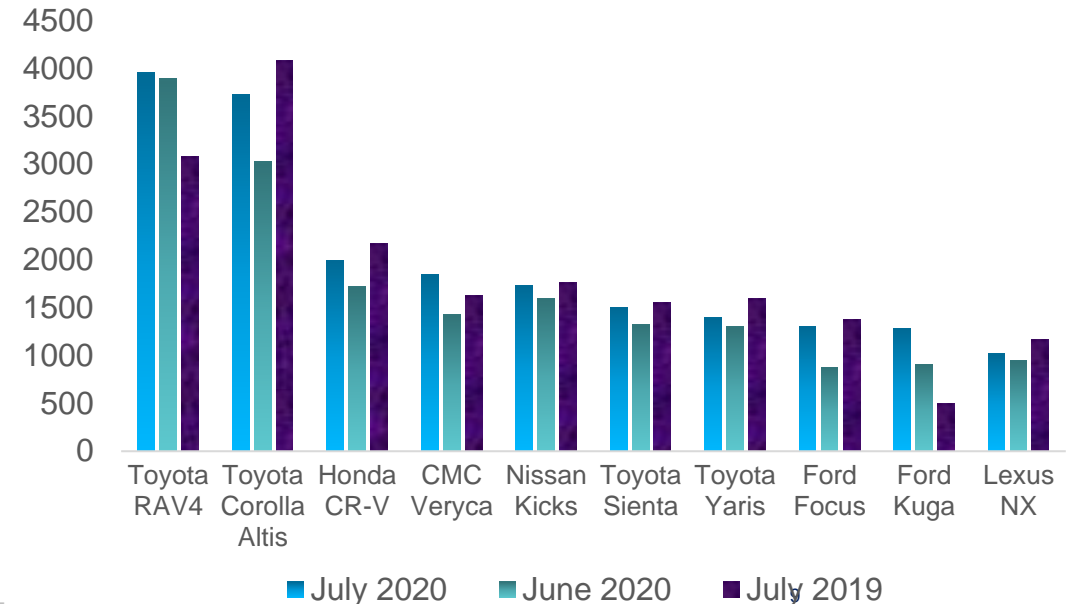
Although the global epidemic has not subsided and there is still a sense of uneasiness around the world, Taiwan's relatively stable epidemic control has still achieved a relatively stable situation for the social economy and consumption. After the sales results for the whole month were released, the sales data really showed a warm atmosphere. The total market was listed to 43,939 vehicles in July, which is only a short distance from the 44,000 vehicles mark. It has become the month with the highest monthly sales volume in 2020.

Compared with June, there is also an increase of 6.2%. At present, the cumulative sales volume in the first seven months of 2020 is 253,720 vehicles. Compared with the cumulative sales of 255,351 vehicles in the same period of 2019, there is still a 0.6% lagging margin. The actual number of vehicles behind is 1,631. As sales in the general market are booming, there are also a number of best-selling cars in the rankings. The best monthly sales record before July 2020 has been written, showing the enthusiasm for buying mainstream cars in the market. What's more special is that it is approaching the 4,000 mark, and the RAV4, which is the total market sales champion with 3,961 vehicles, is still not as good as the 4,089 vehicles handed over in January. It is missed to set a new annual monthly sales record, but its combat effectiveness is still amazing.

## Taiwan Sales Comparison

Taiwan's relatively stable epidemic control has made the automobile market relatively stable in July

In July, the sales champion was still led by Toyota RAV4 with 3961 units, with a month-on-month sales increase of 1.8% and a year-on-year sales increase of 28.5%. The Toyota Corolla Altis ranked second this month with 3,724 vehicles, an increase of 23.2% month-on-month and a year-on-year sales decline of 8.7%. Honda CR-V ranked third with a good result of 1994, with sales increasing by 16.1% month-on-month and down 8.1% year-on-year. CMC Veryca ranked fourth with a good score of 1,846 vehicles, and Nissan Kicks ranked fifth with 1736 sales in July, with a month-on-month sales increase of 9% and a year-on-year sales decline of 1.5%. Toyota Sienta ranked sixth with 1,504 vehicles, Toyota Yaris increased 7.3% month-on-month, and sales fell 12.8% year-on-year, ranking seventh. Finally, Ford Focus, Ford Kuga, and Lexus NX ranked eighth, ninth and tenth with 1,306, 1,286, and 1,015 respectively. As sales in the general market are booming, a number of best-selling models in the ranking list have written the best monthly sales record before July 2020, showing the enthusiasm for mainstream car models in the market.



# TAIWAN VIO REPORT

Taiwan (China)



VIO until 2019 H1

VEHICLES IN OPERATION

8,265,560

KTYPE WITH VIO

6271

VEHICLE BRANDS

90

## VIO BY VEHICLE SEGMENTS

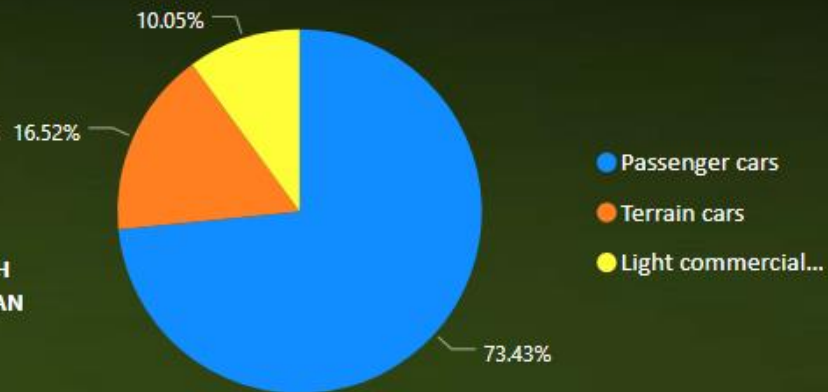
### INFORMATION

TERRAIN CAR(e.g. SUV & PICKUP)

INCLUDES VEHICLES SUCH AS TOYOTA HILUX,SUZUKI JIMNY,BMW X5 & ETC

LIGHT COMMERCIAL VEHICLE

INCLUDES VEHICLE<7.5 TONNES SUCH AS TOYOTA HIACE,HONDA ACTY,NISSAN NV-SERIES & ETC



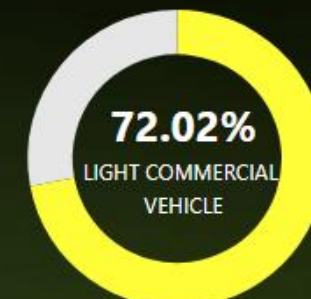
## K-TYPE / VIO COVERAGE BY SEGMENT



5989.0K  
VIO COVERED



1322.5K  
VIO COVERED



598.4K  
VIO COVERED

## TOP1 VEHICLE BASED ON VIO



TOYOTA



COROLLA

VIO OF TOP1 VEHICLE

653,204

POPULATION SHARE

7.90%

## TREND OF ANNUAL REGISTRATION FROM 2010 TO 2018



TecAlliance China

## TOP 1000 VIO K-TYPE MAPPING

TOP 1000 VIO =75.71%  
Total VIO



MATCH	VIO	%
Mapped	6,002,034	95.90%
Unmapped	256,596	4.10%

## MAP

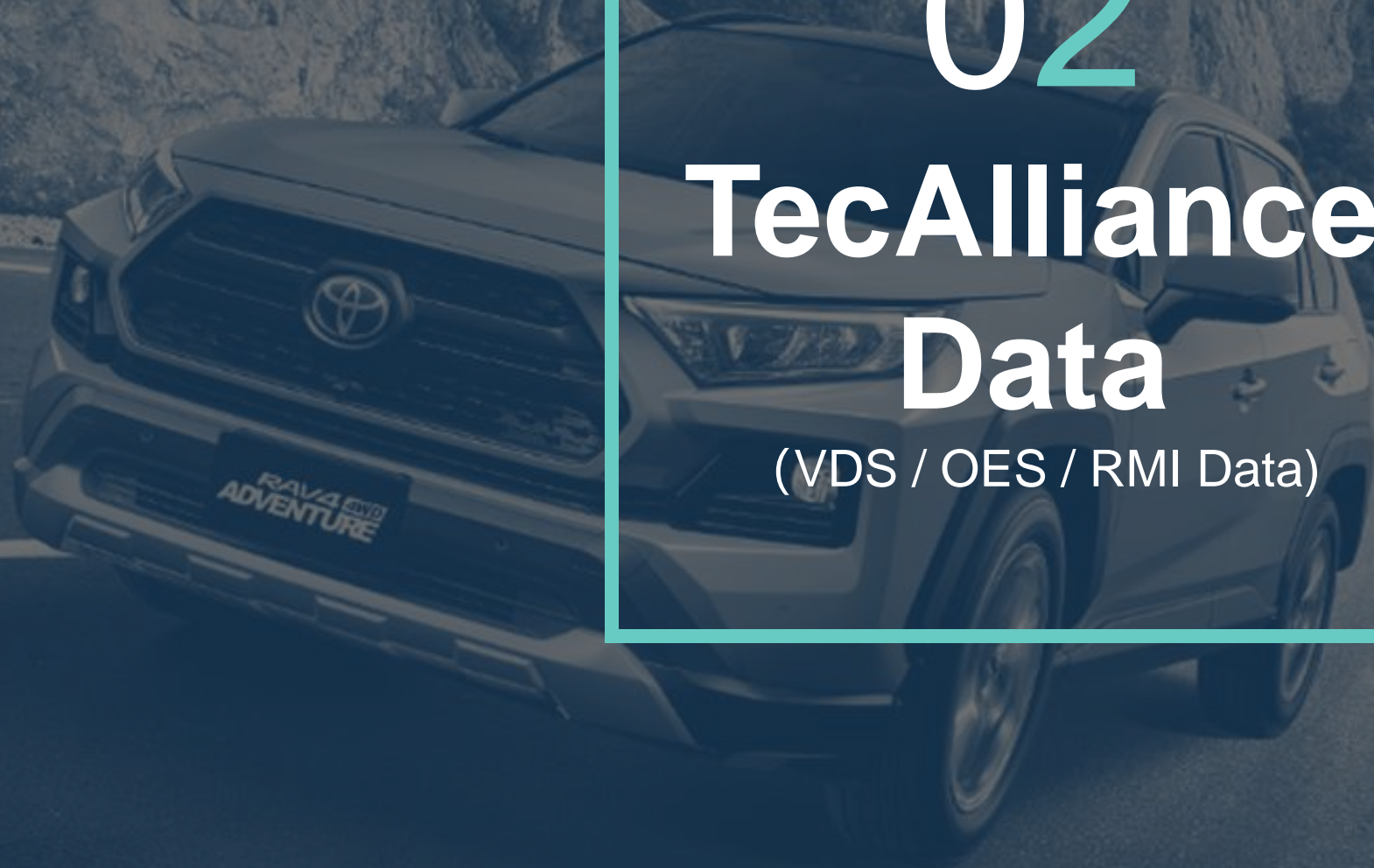


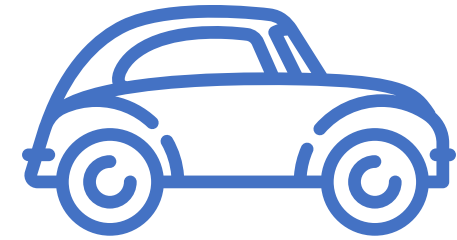
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# TecAlliance Data

(VDS / OES / RMI Data)



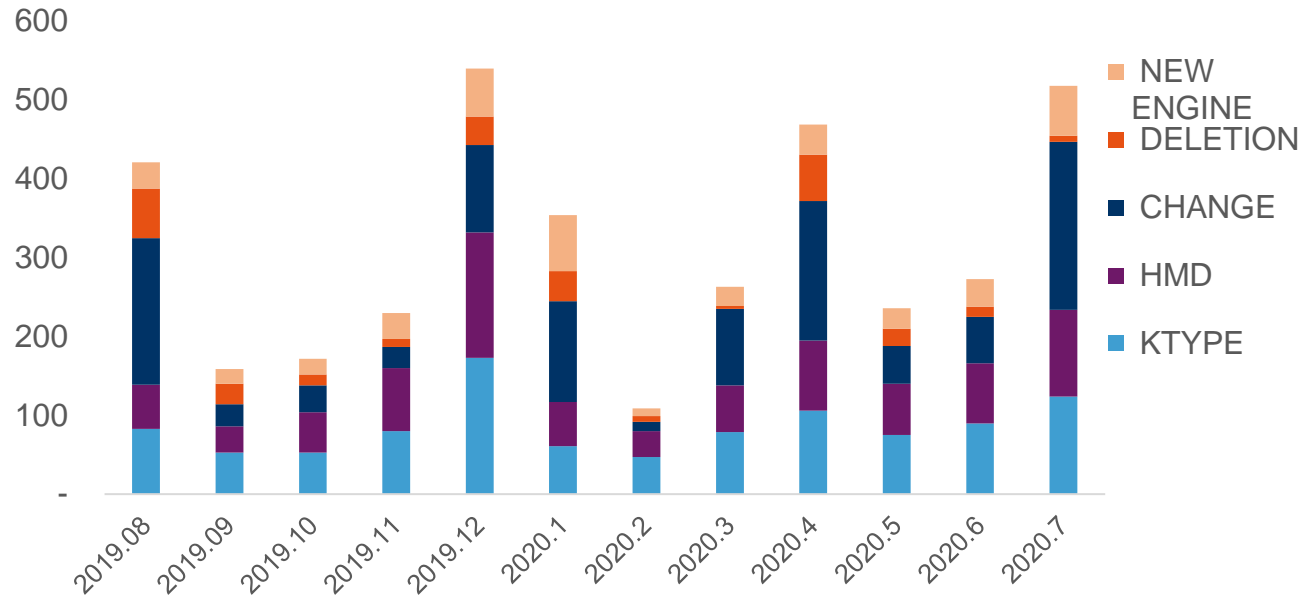


# Vehicle Data Overview

# TecAlliance Vehicle Team Dash Board

## VDS Monthly Dashboard

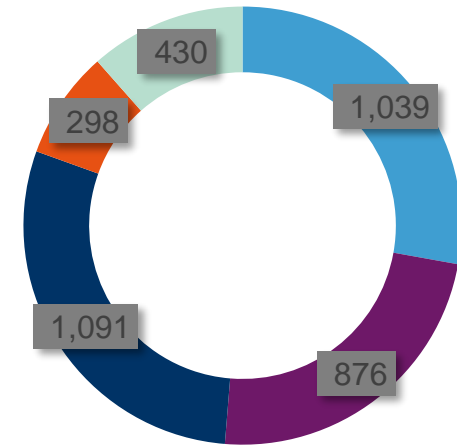
2019 Aug – 2020 Jul



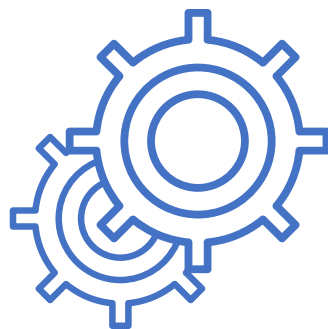
YEAR	2019	2019	2019	2019	2019	2020	2020	2020	2020	2020	2020	2020
MONTH	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL
KTYPE	83	53	53	80	173	61	47	79	106	75	90	124
HMD	56	33	51	80	159	56	33	59	89	65	76	110
CHANGE	186	28	34	27	111	128	12	97	177	48	59	213
DELETION	63	26	14	10	36	38	7	4	59	22	13	8
NEW ENGINE	33	19	20	33	61	71	10	24	38	26	35	63

## Latest K-type numbers (China Mainland): 8631

2019 Aug – 2020 Jul








- KTY** Release new KType for China market
- HMD** Release new HMD for China market
- CHA** Do amending to KType and HMD
- DEL** Remove invalid KType and HMD from China
- ENG** Create new engine code in the database



# OES Data Overview



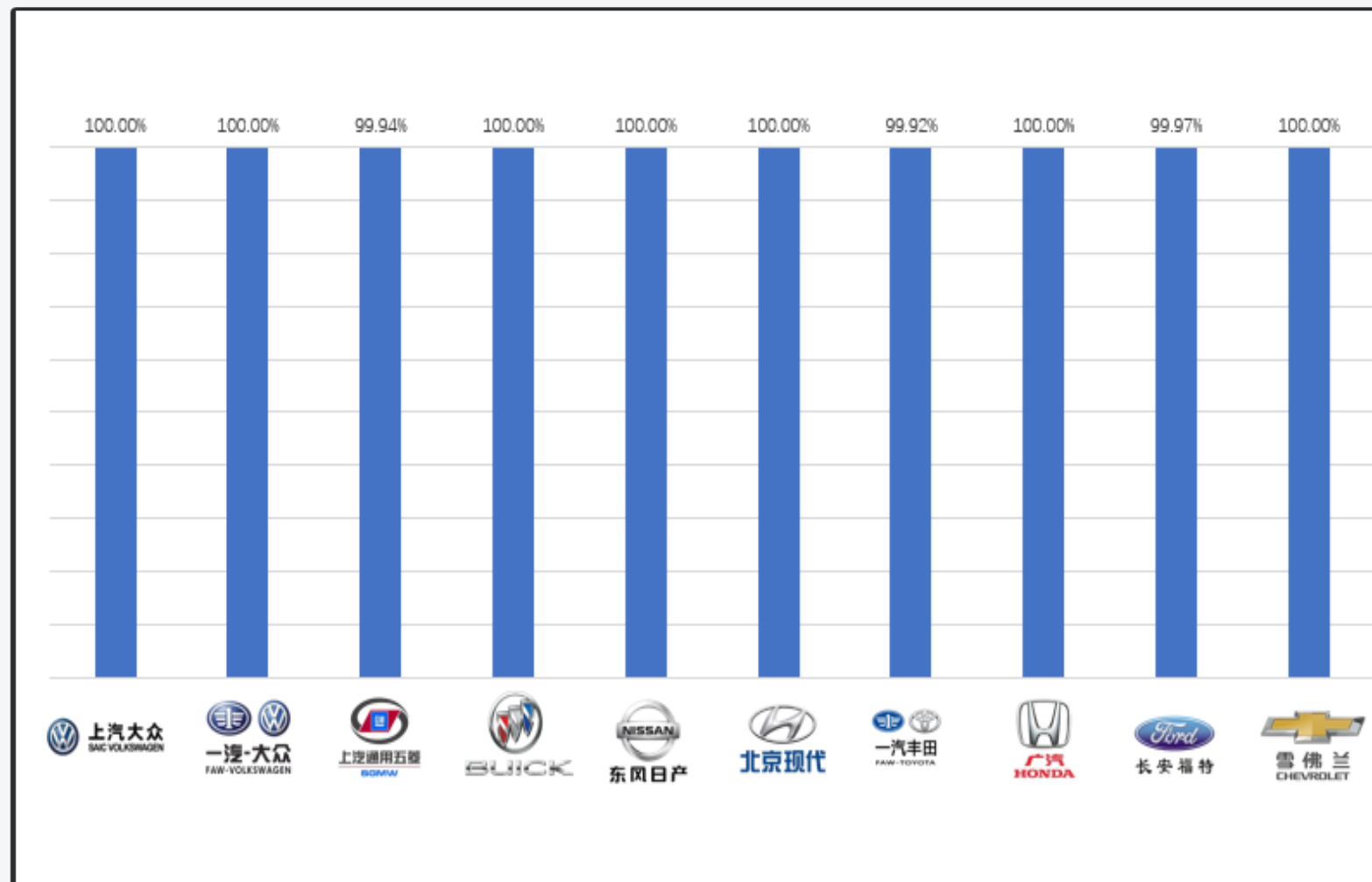
## New launched vehicles & OE numbers (Selection)

Brand	Sales Designation	Engine Capacity (litre)	Engine Type	Construction From (M/D/Y)	Maximum output (KW)	Maximum output (HP)	Oil Filter(GA 7)	Air Filter (GA 8)	Interior Air Filter (GA 424)
 NISSAN (DFAC)	TIIDA	1.6	Petrol Engine	7/1/2020	90	122	15208E****	16546J****	278912****
 WULING (SGMW)	HONGGUANG V	1.5	Petrol Engine	7/1/2020	56	76	9025***	2362****	2359**** 2376****
 MERCEDES-BENZ	GLE	3.0	Petrol Engine	7/1/2020	320	435	A256180****	A654094****	A167835****
 LEXUS	RX	2.0	Petrol Engine	7/1/2020	170	231	041523****	178013****	871394****
 MERCEDES-BENZ	A-CLASS	2.0	Petrol Engine	7/1/2020	285	387	A176180****	A139094****	A247830****

***P.S: Please contact our sales team if you request OE numbers for your product group.***

# Braking & Hydraulics System Coverage

*based China  
2019 VIO  
222M  
( Ktype  
Coverage ) &  
Manufacturers*

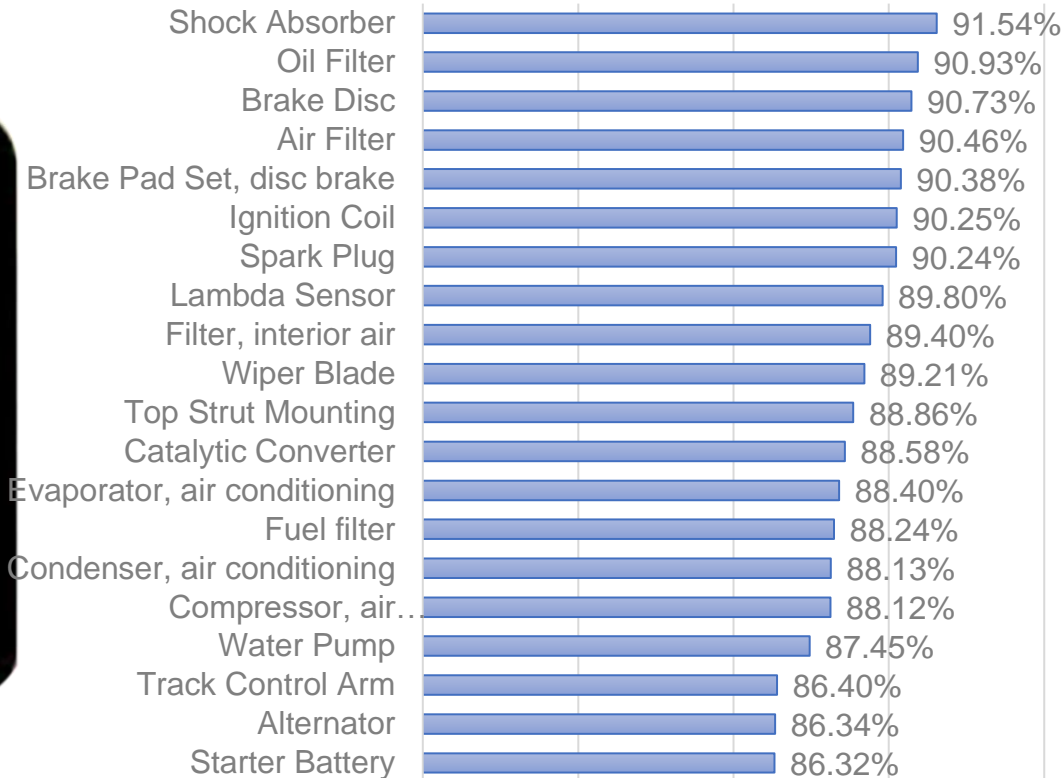




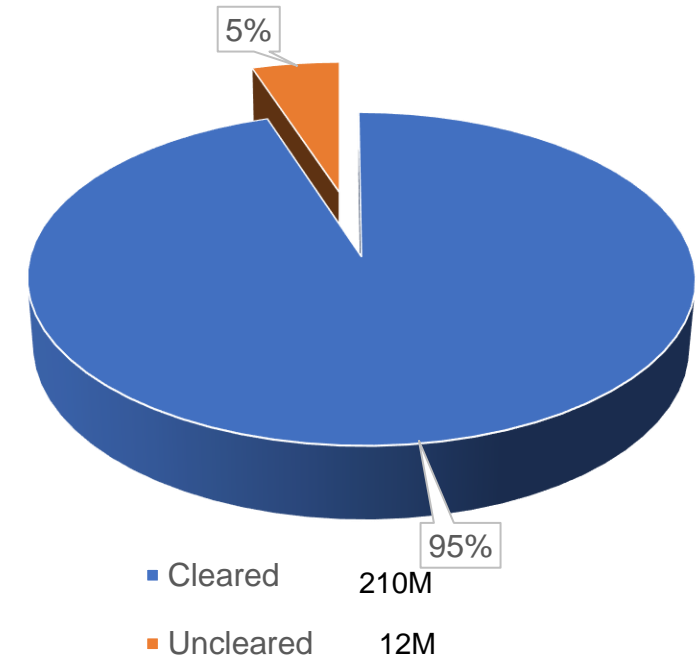
# Data on-hand by Generic Article (GA)

K-type coverage by Generic Article(GA) is based on China 2019 VIO 214M & Availability of EPC

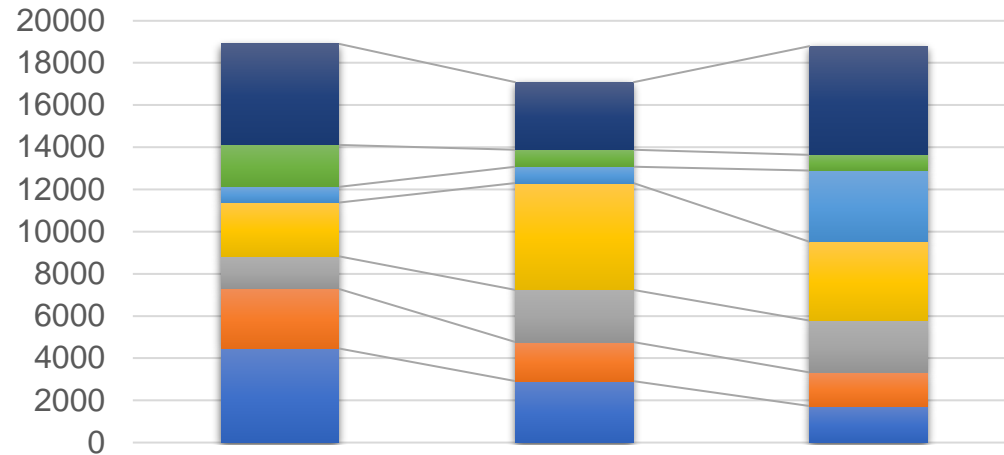
### Top 20 GA



### VIO coverage (based on acquired EPC)

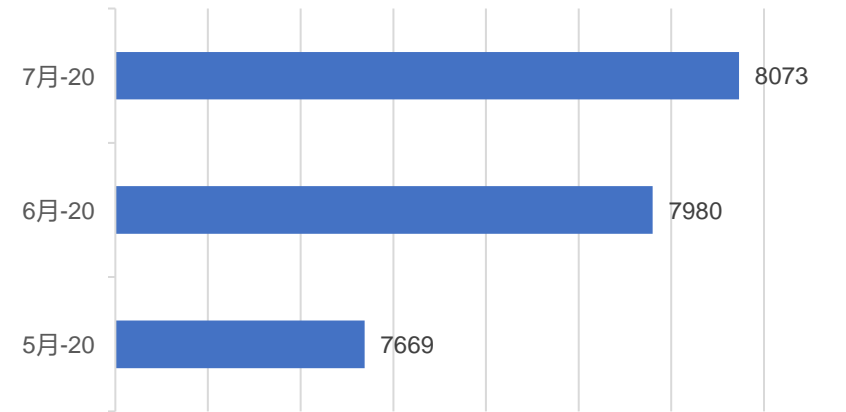


# New OE to Ktype Linkages by Month

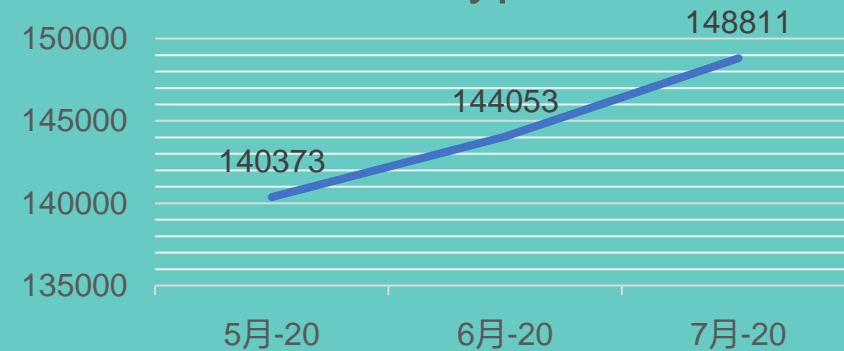


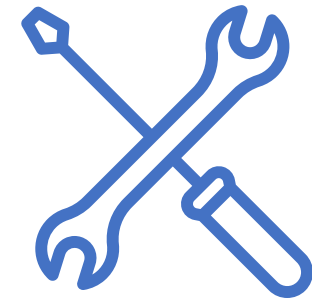
	5月-20	6月-20	7月-20
Steering & Suspension	4805	3197	5146
Ignition	1986	800	756
Glazing	738	781	3384
Exhaust	2547	5066	3720
Engine & Sealing Products	1549	2465	2458
Cooling	2822	1857	1602
Braking & Hydraulics	4459	2912	1725

Total K-type matched OE number



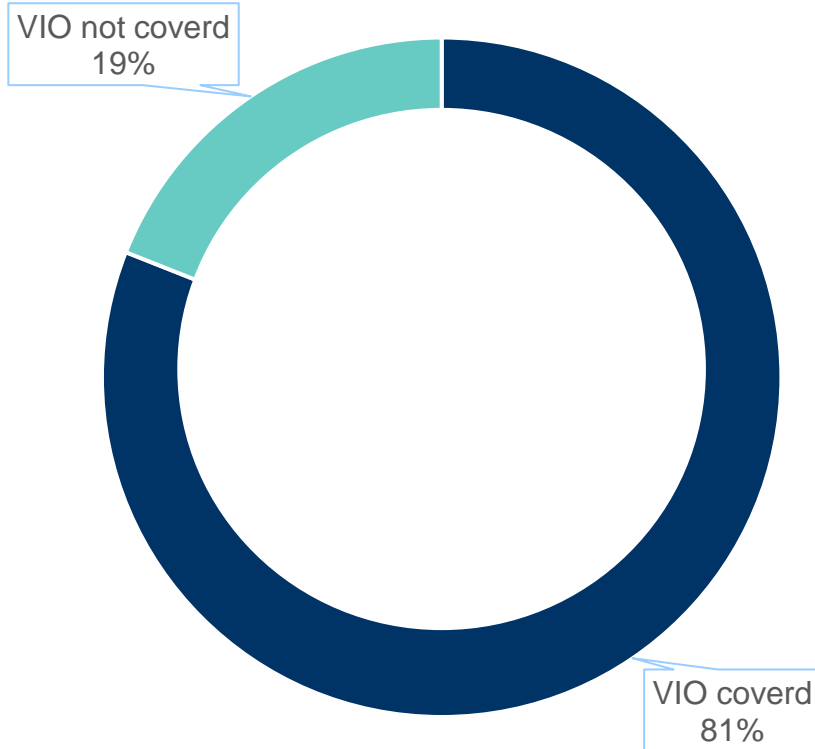
Total OE number matched to K-type





# RMI Data Overview

## TecRMI Data Overview (maintenance)

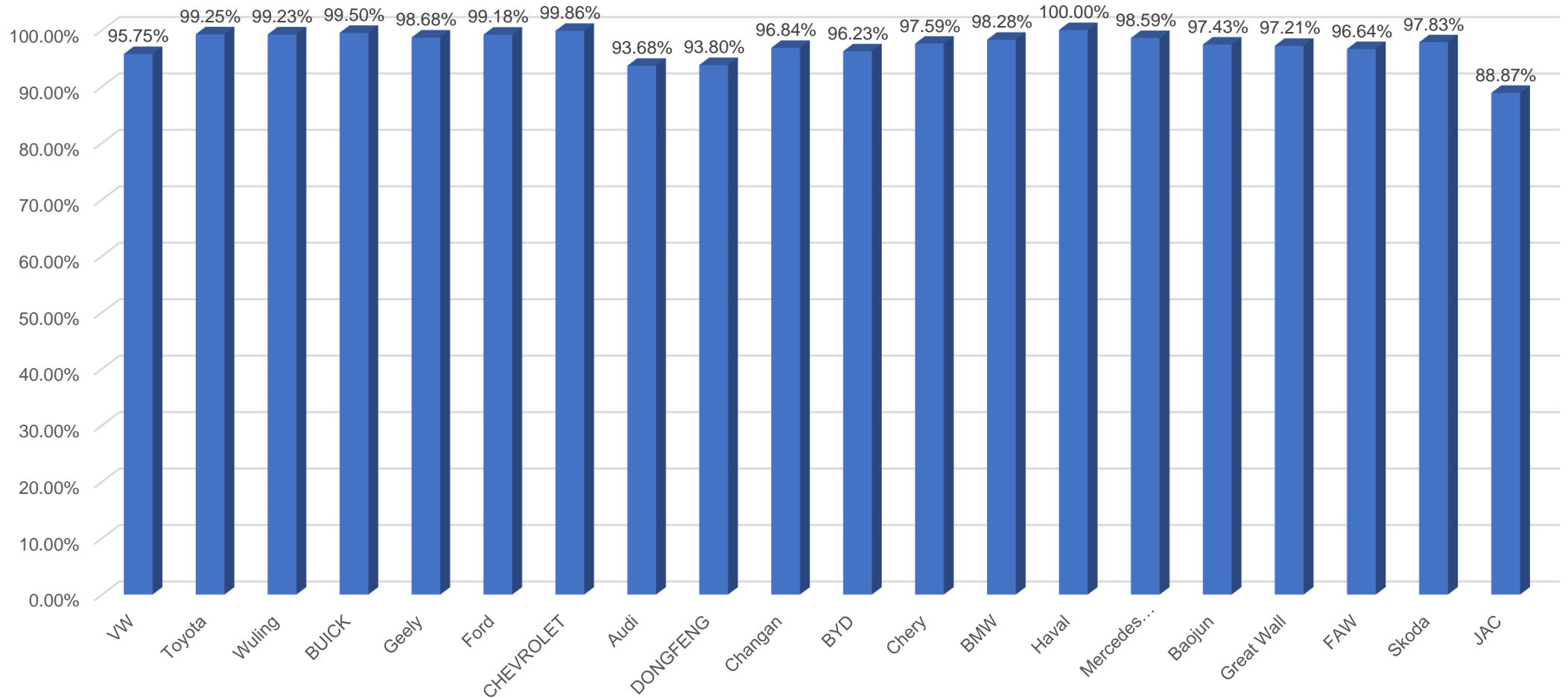


■ VIO covered ■ VIO not covered

**81%**  
**180M Vehicles**  
**of 222M VIO Completed**

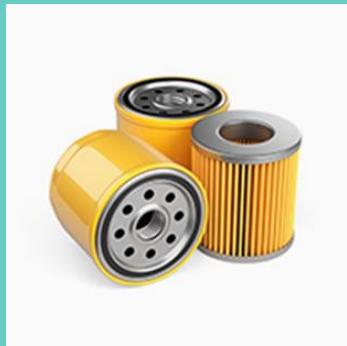
# Top 20 Vehicle Brand Based on China VIO

Coverage of Maintenance Information



# TecRMI Maintenance data overview

Oil & Fluid Specification/ Filling Quantity



**Engine Oil**  
~97% of VIO



**Gearbox Oil**  
~97% of VIO



**Brake Fluid**  
~95% of VIO



**Coolant**  
~95% of VIO



**A/C Refrigerant**  
~61% of VIO



**Others Available on Demand**  
axle oils, steering oil etc.

# TecRMI Maintenance data overview

## Maintenance Interval

- Engine Oil and Filter ~87% of VIO
- Spark Plug ~88% of VIO
- Transmission Oil and Fluid ~87% of VIO
- Air Filter ~88% of VIO
- Interior Filter ~88% of VIO
- Fuel Filter ~87% of VIO
- Brake Fluid ~87% of VIO
- Coolant ~87% of VIO



# Contact Us

## Parts manufacturer China



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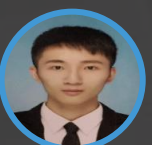
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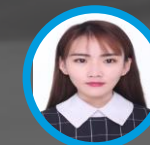
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03

# Product & Solution

(Southeast Asia  
Vehicle in Operation )



# TecAlliance Product Management Analytics (PMA)



Suitable for : **Data vendor**

Provide services based **on the data vendor's market**

The data **covers all areas** of the TecAlliance database  
( Including Europe, East Asia, Southeast Asia and so on )

**Multilingual support**

# Feature introduction



## Data

Upload to Database via  
DMM R2



## (PMA)

Select the required data  
through PMA



车型类别  
Vehicle



国别限制  
Countries restriction



国家保有量  
VIO Countries



产品&状态  
Product & Status



竞品  
Competitor



车型 品牌  
Vehicle Make

TecAlliance database has rich worldwide data, including Parts data, vehicles and VIO for many markets, the more large the database is, the more useful report will be made.



## Excel Report

- Make market analysis report by comparing with competitors data in the TecAlliance

## Four types Of Ten reports

**Product coverage  
analysis**

**Competing goods  
analysis**

**Analysis of potential  
market share**

**Product data  
overview**

**Multi-dimensional analysis helps you  
manage your products effectively**

04

**TecAlliance  
Company  
NEWS**



# Company News

## Visit the garage

In order to better understand the Chinese market, more direct talk with our customers.

On 13 August, the TecAlliance China-PADS team led our sales to a local workshop in China to visit.

Had a good time with the person in charge of the workshop!  
Expect us to get better and better!



# Company News



## China Automotive Aftermarket Channel and Supply Chain Summit 2020

On August 5, the third China Automotive Aftermarket Channel and Supply Chain Summit 2020, which was hosted by AC Motors, was successfully concluded in Shanghai.

In this forum, more than 30 industry guests were invited, 80+ supply chain platform and auto parts dealers, 100+ terminal stores, attracting more than 400+ automotive aftermarket professionals to participate!

TecAlliance in this activity with a total of 27 Supply chain and online platform, 7 manufacturers conducted business negotiations, looking forward to establish cooperation with them!

Thank the sales team for their efforts in this event!





TecAlliance

THANK YOU!

TecAlliance China

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