

TecAlliance E-newsletter

Vehicles | New Energy Vehicles

Greater China

Version June 2024

30 YEARS

TecDoc

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- China Hong Kong
- China Taiwan

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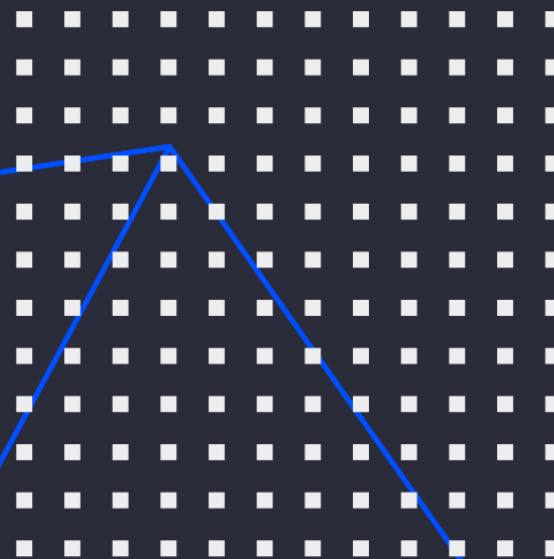
- Celebrating 30 Years of TecDoc
- 2024 China Marketing Communication Roadmap



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



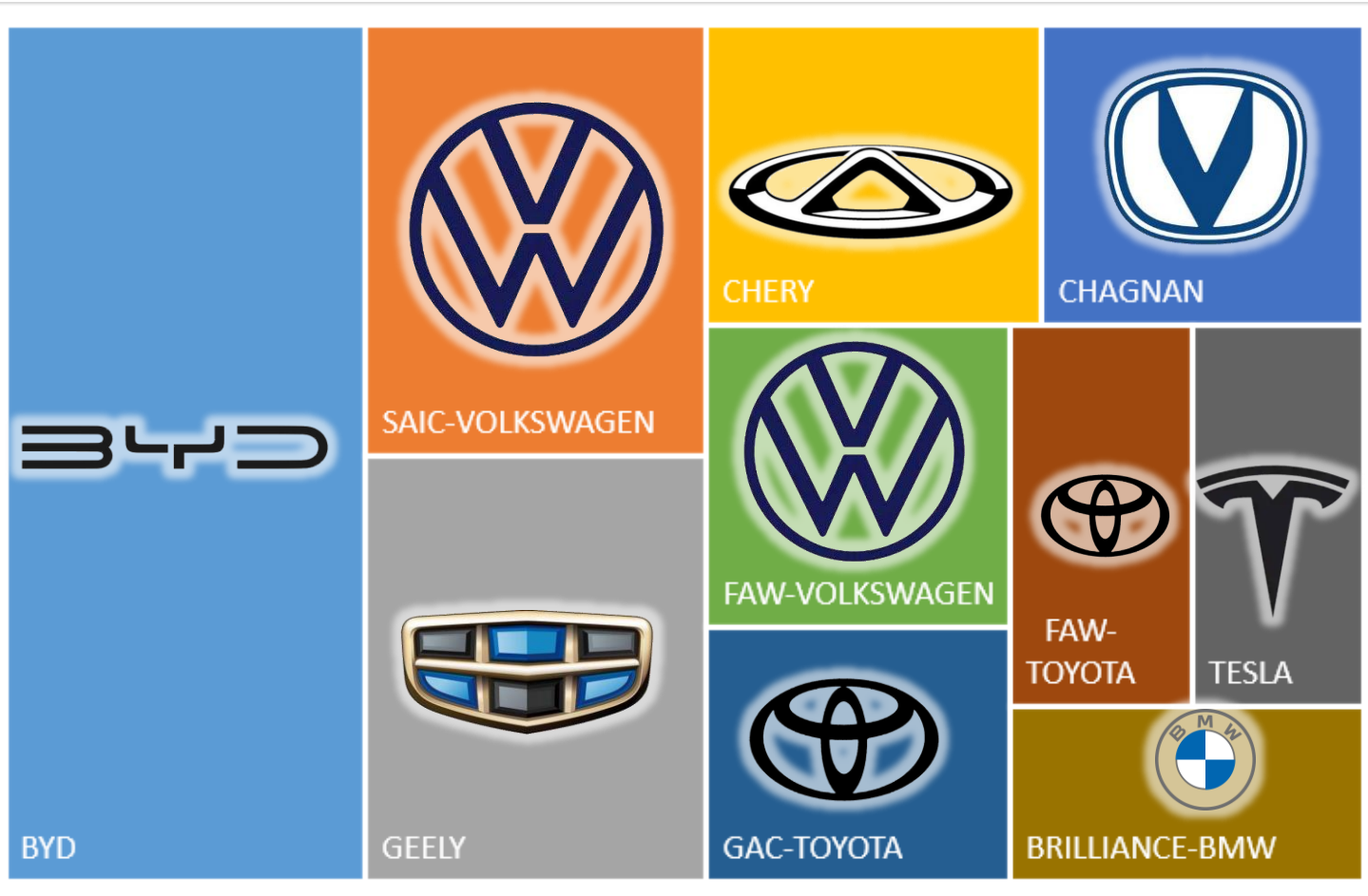
BMW: Fuel and pure electric will be produced together in the future



- In response to future strategies, BMW has stated that it will produce all powertrain systems on one production line, including gasoline powered vehicles, hybrid vehicles, electric vehicles, and natural gas vehicles, making it easier to respond to consumer demands and regulatory changes. BMW believes that despite the rise of electric vehicles, fuel powered models still have a promising future.
- Bernd, BMW's product manager, said, "Two years ago, we had an overly optimistic estimate of electric vehicle sales, but now the situation is too pessimistic. By continuing to invest in all powertrain types, BMW can quickly respond to constantly changing consumer and policy demands. In the foreseeable future, we will adopt flexible technological methods, which is why we plan to build all transmission systems on one production line. In this way, even if the market changes direction, we will not close factories or reduce staff, just adjust direction."
- At present, BMW's similar strategy has been reflected in many car models, including BMW 3 Series, 5 Series, 7 Series, X1, X3 and other models, all of which have corresponding electric models. This method will also continue to be extended to electric vehicles built by the brand based on the Neue Klasse platform.

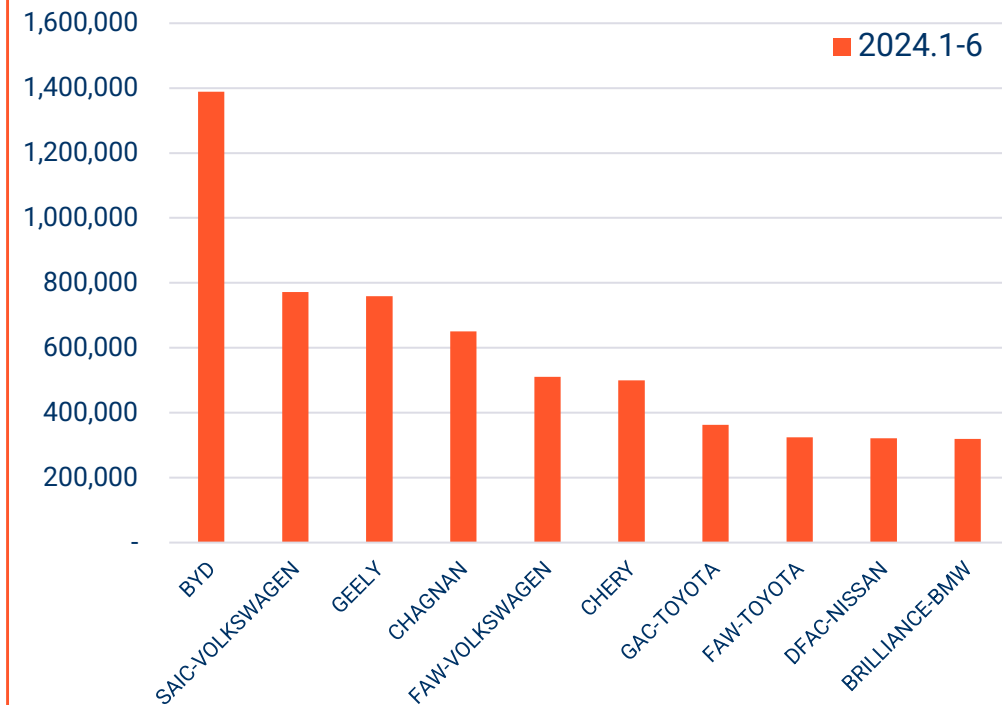
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in June 2024



Sales comparison

From the sales figures from January to June, BYD's sales are ahead of other brands.

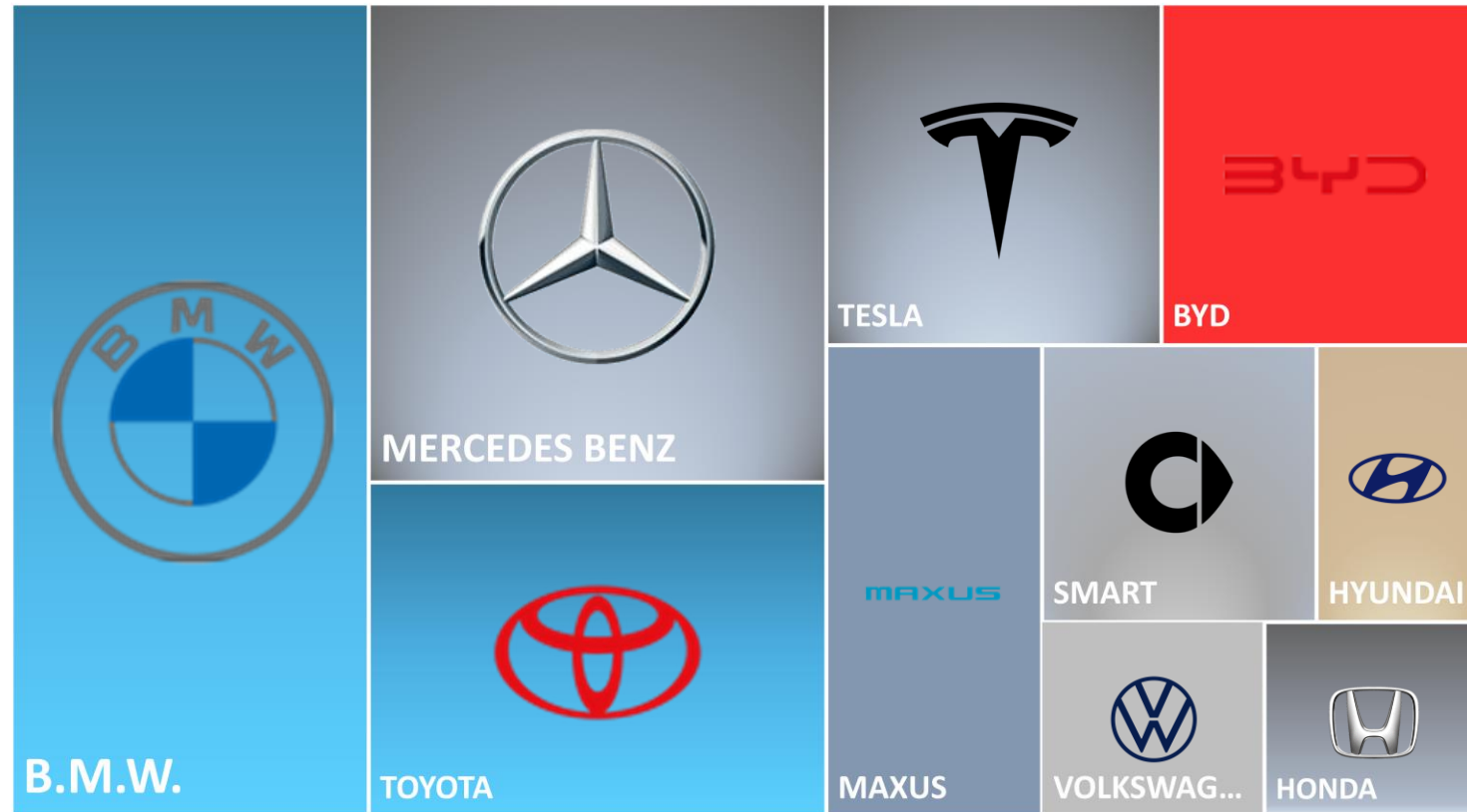


Hong Kong Highlight Vehicle News

Hong Kong April 2024 Vehicle News

Hong Kong passenger car sales in April 2024 were 6,435 units, compared to 5,918 units in March 2024, up 33.6% month-on-month. BMW sold 1,328 vehicles, up 129% month-on-month, making it the most popular car brand in Hong Kong for the first time.

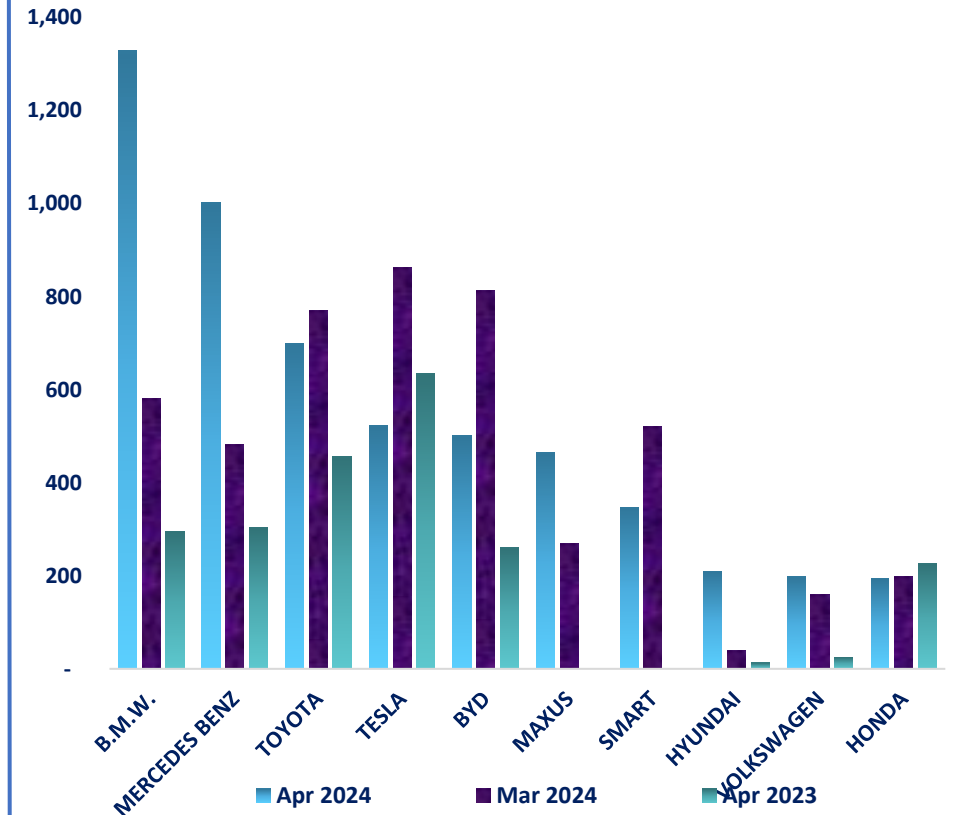
Mercedes-Benz ranked second with 1,002 units sold, with sales soaring 107% month-on-month. Toyota fell 9.1% month-on-month to third place. Tesla's sales fell 39% month-on-month, ranking fourth. BYD ranked fifth with 501 units sold. The rest of the top 10 brands, except for SMART, showed varying degrees of growth in monthly sales. Overall, the sales volume of the entire automobile market showed an overall growth trend.



Sales Comparison

Total vehicle sales showed steady growth

In April, BMW became the most popular automaker in Hong Kong for the first time. Mercedes-Benz sales soared month-on-month, ranking second. Toyota's sales fell month-on-month, ranking third. Tesla's sales fell month-on-month, ranking fourth. BYD's sales fell month-on-month, ranking fifth. Finally, MAXUS, SMART, Hyundai, Volkswagen and Honda are in the bottom five.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for June 2024



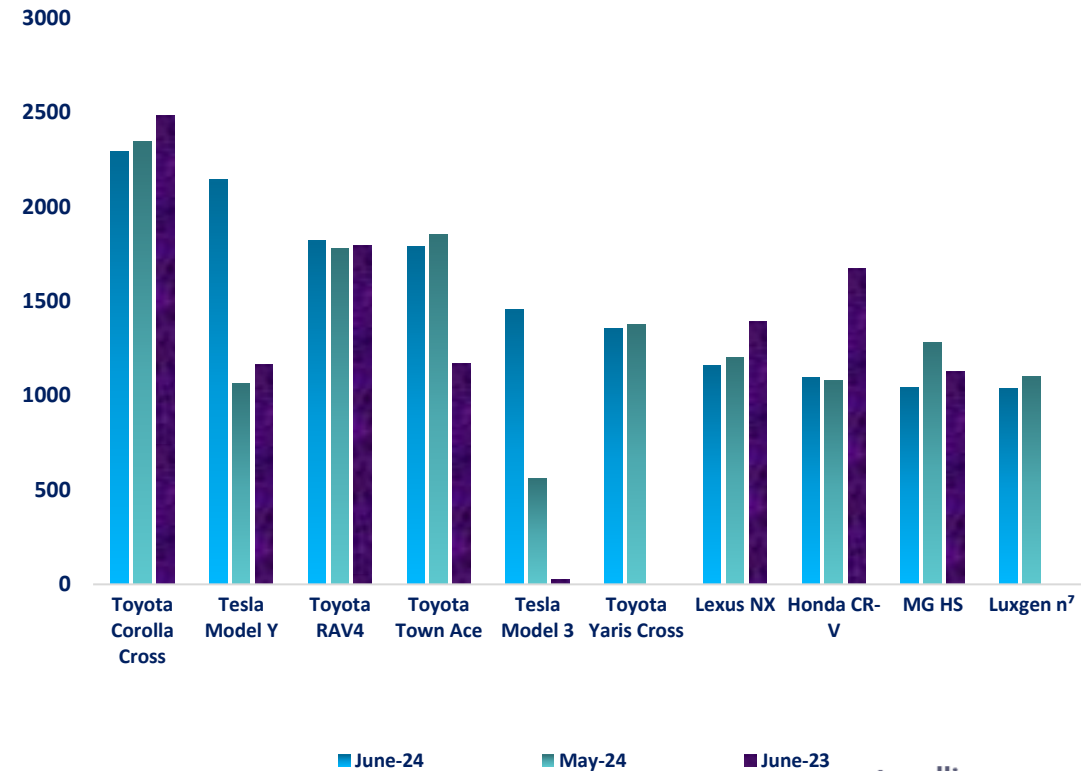
For the whole month of June 2024, sales were 41,587 units, roughly similar to May, with only a slight increase of 0.3%, and the cumulative sales in the first half of 2024 were 232,503 units, a slight decrease of 1% compared to the same period in the first half of 2023. Tesla, the most prominent brand in June, ranked second in the total market with 3,898 units and a 9.4% market share, thanks to the delivery of a large number of Model Y and Model 3 vehicles arriving at the port.

In terms of luxury brands, BMW is the most prominent, with a new monthly high of 984 BEVs, and the BMW brand ranks fifth in the overall market with 2,280 units per month, a 9.4% year-on-year increase and a 4.1% month-on-month growth. As for Luxgen and MG respectively with n7 and MG4, both to seize the local passenger car market, n7 has exceeded the 1,000 monthly sales mark for three consecutive months, MG4 began to pay 122 licenses in June, the two local electric vehicles to the brand sales momentum, also worthy of great attention.

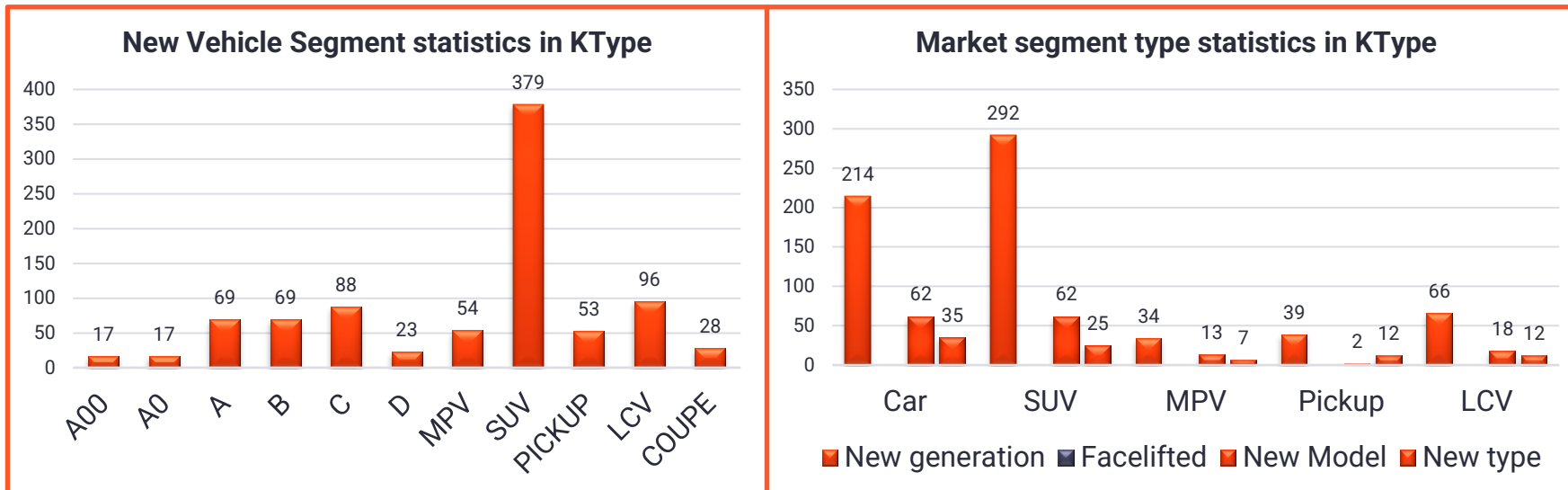
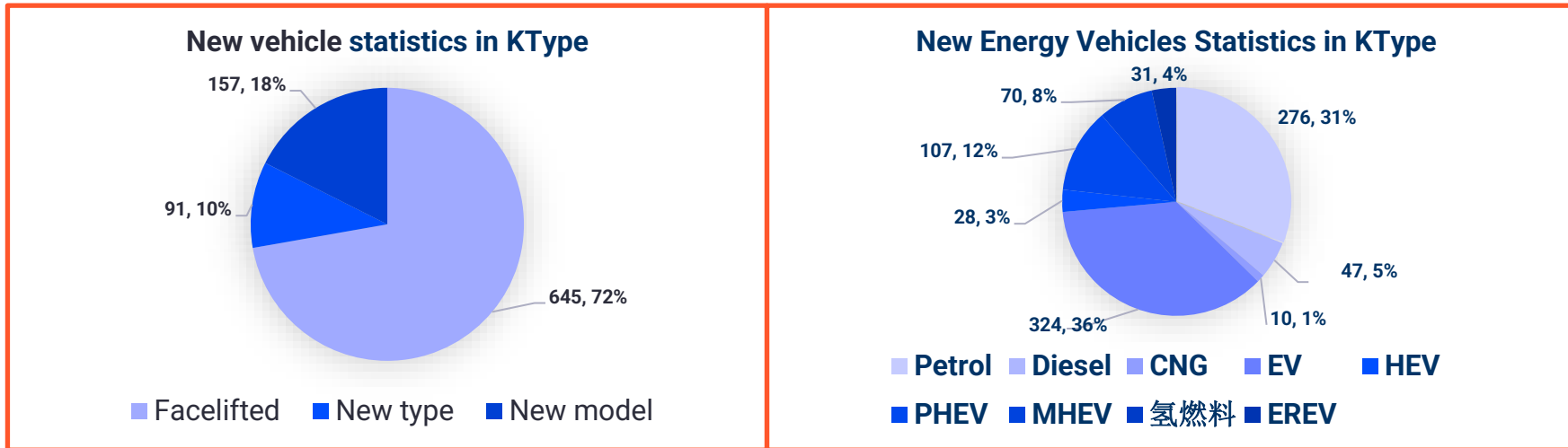
■ Sale Comparison

Sales in the Taiwan market were stable

The top 10 automakers in the total market saw a slight increase of only 0.3% in sales compared to May. The June sales champion continued to be won by Taiwanese supernova Toyota Corolla Cross with 2,293 units. Tesla's Model Y came in second with 2,142 units, up 102% month-on-month. The Toyota RAV4 ranked third with 1,822 units, up 2.4% month-on-month. The Toyota Town Ace was in fourth place with 1,791 units. Tesla's Model 3 came in fifth place with 1,456 units sold, and Toyota's Yaris Cross ranked sixth with 1,358 units sold. Finally, Lexus NX, Honda CR-V, MG HS, Luxgen n7 ranked seventh, eighth, ninth and tenth with 1,158, 1,096, 1,040 and 1,037 units, respectively.



China JAN-JUNE New Vehicle Analysis



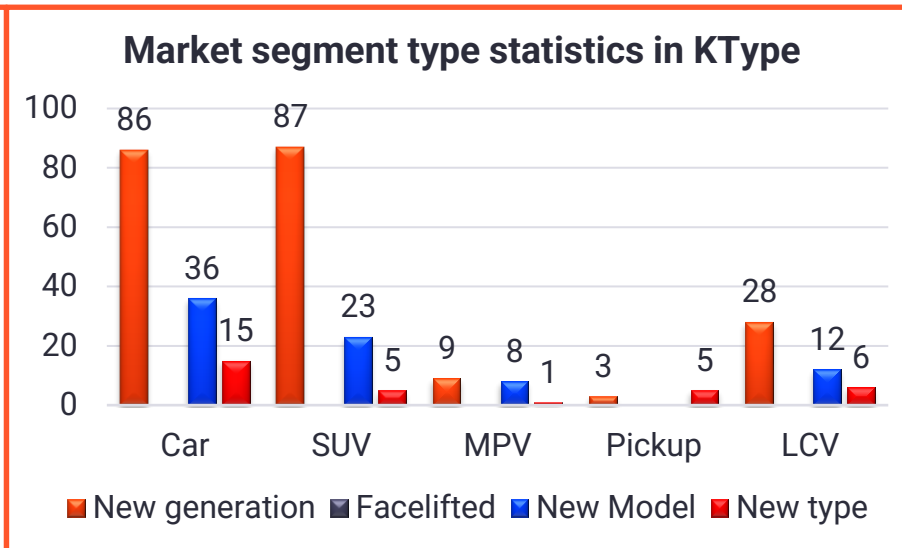
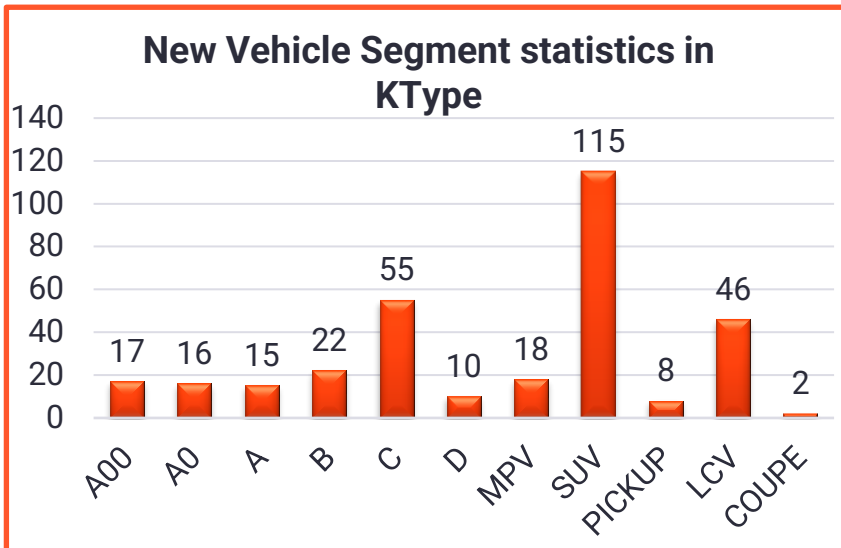
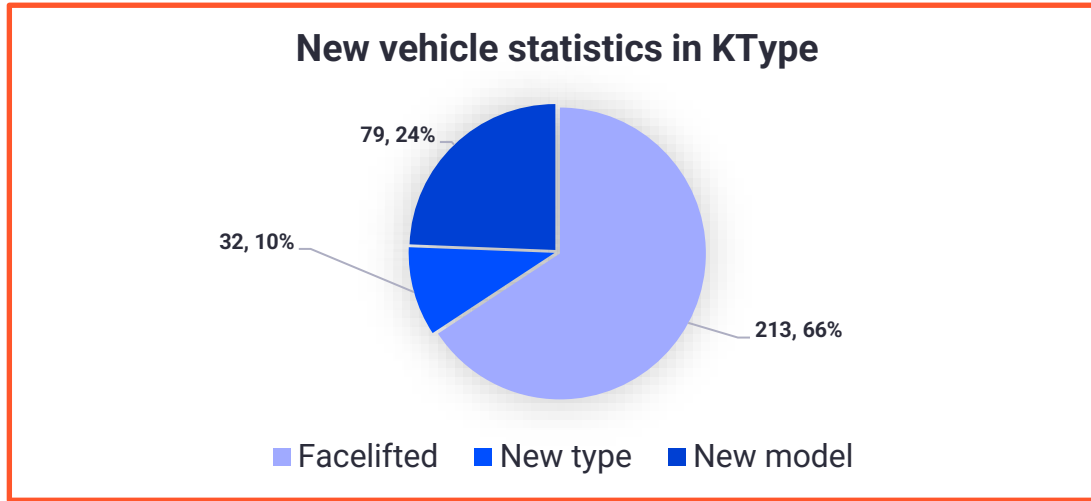
Remarks:

All statistical data is based on K-Type. From **January to June 2024**, the total coverage of **K-Type** was **893**, of which **218** 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

China JAN-JUNE NEV Vehicle Analysis



Remarks:
 All statistical data is based on K-Type. January to March 2024, the total coverage of **NEV K-Type** was **324**, of which **111** were **New K-Type**. Until March 2024, **EV KType** currently has **1253**.
 New model means that launched model that did not exist before.
 New type means that the new displacement and power have been launched.

China New Vehicle Statistics

#	Brand	Total
1	BYD	42
2	MERCEDES-BENZ	33
3	CHERY	29
4	CHANGAN	29
5	MAXUS	26
6	PORSCHE	26
7	MERCEDES-BENZ (BBDC)	26
8	VW (FAW)	22
9	JAC	20
10	TOYOTA (GAC)	19
11	GEELY	19
12	VW (SVW)	18
13	JETOUR	18
14	HONGQI	15
15	SRM (BRILLIANCE)	14
16	BMW	14
17	GAC	14
18	FOTON	14
19	LEAPMOTOR	14
20	ISUZU (JIANGXI)	12
21	WULING (SGMW)	12
22	CHANA	12
23	NETA (HOZON)	11
24	YUANHANG	11
25	TOYOTA (FAW)	10
26	EXEED (CHERY)	10
27	ARCFOX	10
28	DEEPAL	10
29	SKYWORTH	9
30	BUICK (SGM)	9
31	JMC	9
32	RCEV	9
33	HAVAL	8
34	HONDA (GAC)	8
35	DENZA	8
36	AEOLUS	8
37	BAIC-ORV	7
38	AUDI	7
39	IM MOTORS	7
40	ZEEKR	7

#	Brand	Total
41	VOLVO ASIA	7
42	NIO	7
43	GREAT WALL	7
44	QIYUAN	7
45	LYNK & CO	7
46	SMART	6
47	FENGXING	6
48	GALAXY	6
49	GAC NE	6
50	LINCOLN (CHANGAN)	6
51	JAC EV	6
52	LIVAN AUTO	6
53	JINBEI	6
54	AVATR	6
55	LEXUS	6
56	AITO	5
57	YIPAI	5
58	BAW	5
59	TANK	5
60	VOYAH	5
61	NISSAN (DFAC)	5
62	LIXIANG	5
63	LOTUS	5
64	ALFA ROMEO	5
65	GEOMETRY	4
66	AUDI (SAIC)	4
67	BMW (BRILLIANCE)	4
68	XPENG	4
69	HONDA (DONGFENG)	4
70	ORA	4
71	TESLA	4
72	REFINE	4
73	FORD (JMC)	4
74	i CAR	3
75	BESTUNE	3
76	NAC IVECO (NAVECO)	3
77	GENESIS	3
78	JAGUAR (CHERY)	3
79	NISSAN (ZHENGZHOU)	3
80	MASERATI	3

#	Brand	Total
81	FORD USA	3
82	LINXYS	3
83	KIA (DYK)	3
84	LAND ROVER (CHERY)	3
85	LEVC	2
86	DONGFENG (DFAC)	2
87	DONGFENG XIAOKANG	2
88	NAMMI	2
89	YANGWANG	2
90	COWIN	2
91	CADILLAC (SGM)	2
92	BAIC	2
93	KING LONG	2
94	VENUCIA	2
95	XIAOMI	2
96	KARRY	2
97	JETTA	2
98	SUBARU	2
99	NEW BAOJUN	2
100	HYPER	2
101	LUXEED	2
102	POLESTAR	2
103	PEUGEOT (DF-PSA)	2
104	JMEV	2
105	FERRARI	2
106	HYUNDAI (BEIJING)	2
107	ZD	2
108	FORD (CHANGAN)	2
109	MCLAREN	2
110	FARIZON AUTO	2
111	RADAR	2
112	FAW (JILIN)	1
113	TOYOTA	1
114	LINGBOX	1
115	MG (SAIC)	1
116	DAYUN	1
117	AUDI (FAW)	1
118	SKODA (SVW)	1
119	NEW GONOW AUTO	1
120	FANGCHENGBAO	1

#	Brand	Total
121	FORLAND	1
122	JIYUE AUTO	1
123	LINCOLN	1
124	MAPLE	1
125	EV HOUSE	1
126	ROEWE (SAIC)	1
127	LANDIAN	1
128	LAND ROVER	1
129	MINI	1
130	ASTON MARTIN	1
131	CHEVROLET (SGM)	1
132	CITROËN (DF-PSA)	1
133	FENGON	1
134	MAZDA (CHANGAN)	1
135	WEY	1

Remarks:

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China New Energy Vehicles Statistics

#	Brand	Total
1	BYD	23
2	PORSCHE	14
3	YUANHANG	11
4	CHANA	11
5	ARCFOX	10
6	LEAPMOTOR	10
7	RCEV	9
8	WULING (SGMW)	8
9	SKYWORTH	7
10	NETA (HOZON)	7
11	IM MOTORS	7
12	ZEEKR	7
13	NIO	7
14	SMART	6
15	GAC NE	6
16	JAC	6
17	JAC EV	6
18	HONGQI	6
19	AVATR	6
20	VW (SVW)	5
21	DENZA	5
22	LOTUS	5
23	SRM (BRILLIANCE)	4
24	MAXUS	4
25	YIPAI	4
26	GEOMETRY	4
27	GALAXY	4
28	VW (FAW)	4
29	CHERY	4
30	XPENG	4
31	EXEED (CHERY)	4
32	ORA	4
33	TESLA	4
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40	MERCEDES-BENZ (BBDC)	3
41	JMC	3
42	LINXYS	3
43	QIYUAN	3

#	Brand	Total
44	LEVC	2
45	NAMMI	2
46	TOYOTA (FAW)	2
47	CADILLAC (SGM)	2
48	XIAOMI	2
49	VOYAH	2
50	KARRY	2
51	NEW BAOJUN	2
52	HYPER	2
53	LUXEED	2
54	POLESTAR	2
55	JMEV	2
56	VOLVO ASIA	2
57	ZD	2
58	FOTON	2
59	FARIZON AUTO	2
60	GREAT WALL	2
61	CHANGAN	2
62	RADAR	2
63	AEOLUS	2
64	AITO	1
65	BESTUNE	1
66	DONGFENG (DFAC)	1
67	YANGWANG	1
68	LINGBOX	1
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72	VENUCIA	1
73	DAYUN	1
74	MERCEDES-BENZ	1
75	AUDI (FAW)	1
76	AUDI (SAIC)	1
77	BMW (BRILLIANCE)	1
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79	NEW GONOW AUTO	1
80	FORLAND	1
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82	HONDA (GAC)	1
83	JIYUE AUTO	1
84	MAPLE	1
85	MASERATI	1
86	LIXIANG	1
87	EV HOUSE	1
88	KIA (DYK)	1
89	JINBEI	1

Remarks:

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China VIO Report

CHINA VIO REPORT

VIO until 2023

China Mainland



VEHICLES IN OPERATION	VIO WITH KTYPE	KTYPE WITH VIO	VEHICLE BRANDS
300,965,583	300,941,648	9479	333

K-TYPE / VIO COVERAGE BY SEGMENT

INFORMATION

DOMESTIC &

INCLUDES BRAND WHICH ARE PRODUCED IN CHINA SUCH AS BYD, GEELY, CHERY&ETC

ASIA JOINT VENTURE CAR

INCLUDES ASIAN JV BRAND WHICH ARE PRODUCED IN CHINA SUCH AS TOYOTA(FAW),HONDA(GAC)&ETC

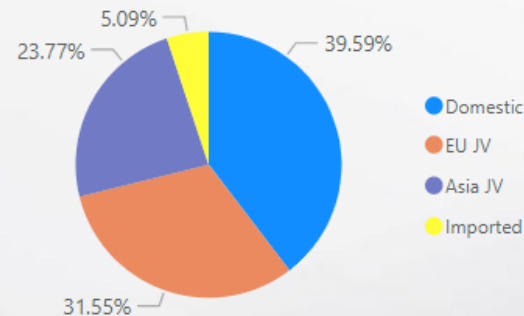
EU JOINT VENTURE CAR

INCLUDES NON-ASIAN JV BRAND WHICH ARE PRODUCED IN CHINA SUCH AS VW(SVW), BMW(BRILLANCE)&ETC

IMPORTED CAR

INCLUDES BRAND WHICH ARE NOT PRODUCED IN CHINA SUCH AS VW, PORSCHE, LAND ROVER & ETC

VIO BY VEHICLE SEGMENTS



Coverage
99.93%
Domestic
119.1M
VIO COVERED



Coverage
99.92%
EU JV
94.9M
VIO COVERED



Coverage
99.95%
Asia JV
71.5M
VIO COVERED



Coverage
99.83%
Imported
15.3M
VIO COVERED

TOP1 VEHICLE BASED ON VIO



VW (SVW)



LAVIDA

VIO OF TOP 1 VEHICLE

1,842,343

POPULATION SHARE

0.61%

TREND OF REGISTRATION FROM 2005 TO 2023(Overall PC)



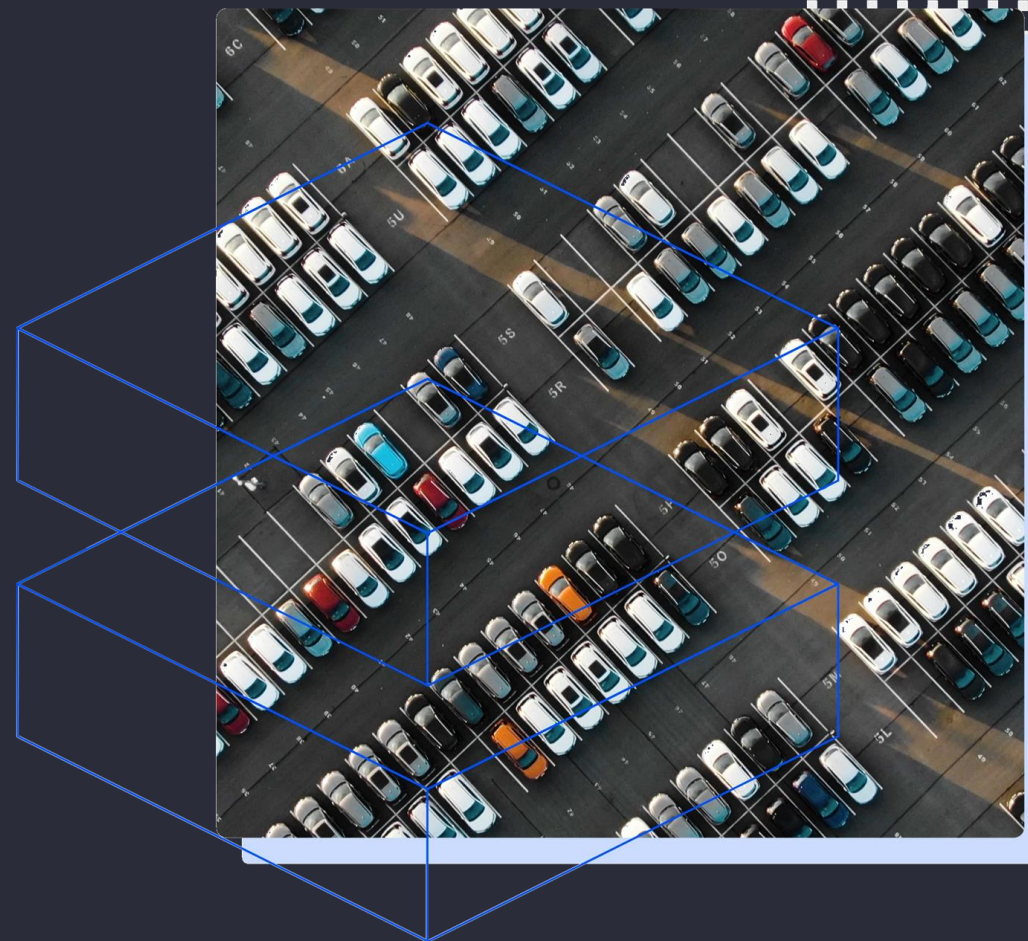
TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2023)



02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types of US Vehicle Brands Researched | YTD 2023

791

Generic Articles of US Vehicle Brands Researched | YTD 2023

206

OE Numbers of US Vehicle Brands Researched | YTD 2023

42K

US Vehicle Brands Covered | YTD 2023

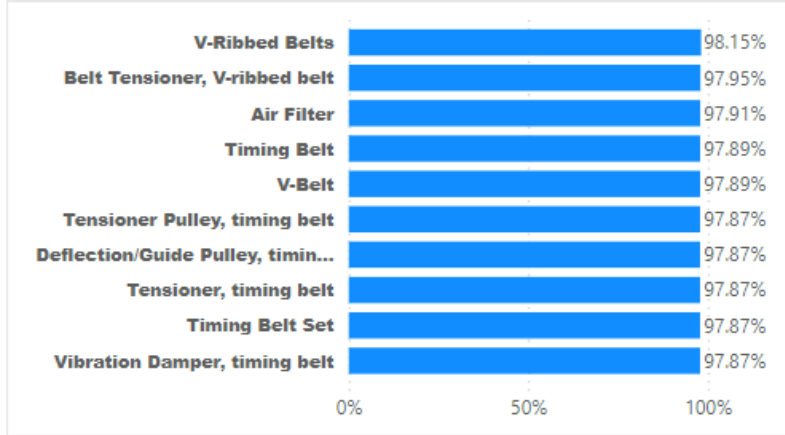
26



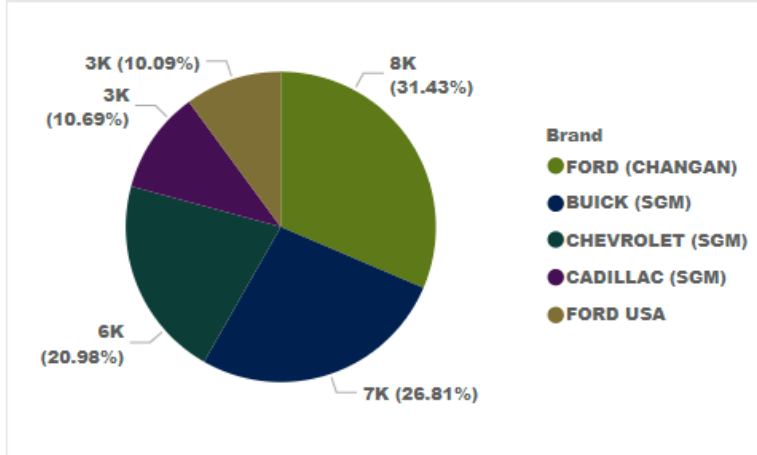
CHINA ▾

2024 ▾

Top 10 Generic Articles by Coverage (US Vehicle Brands)



Top 5 US Vehicle Brands by OE

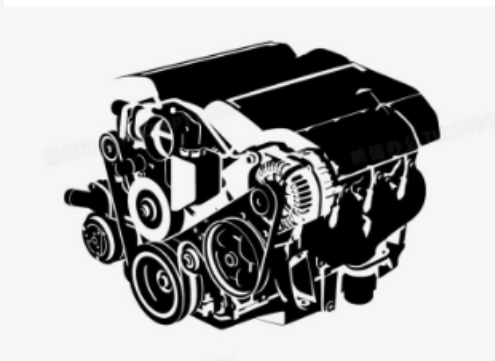


Total OE numbers of FORD

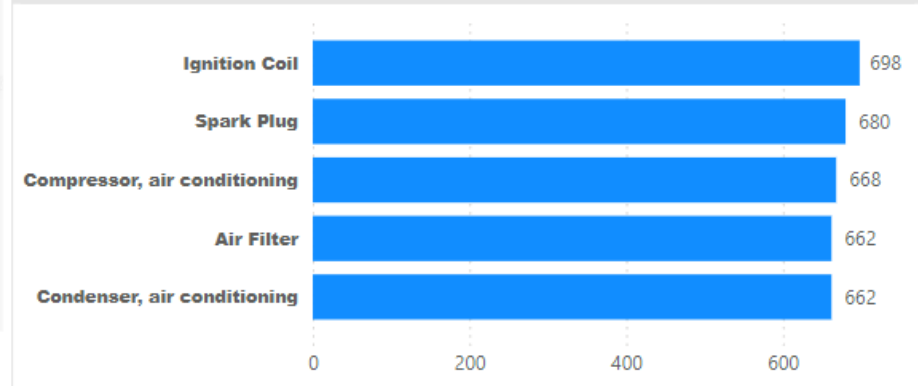
8391



June ▾



Top 5 Generic Articles by K-Types (US Vehicle Brands)



03

Company News

- Celebrating 30 Years of TecDoc
- 2024 China Marketing Communication Roadmap





- **Join us in celebrating a significant milestone: the 30th anniversary of TecDoc**

Everyone has encountered TecDoc in the international IAM. For these 30 years, TecDoc has been one of the world's leading standards for vehicle and spare parts data in the IAM, supporting market participants with its wide range of data solutions and fostering a global ecosystem of data excellence. Let's take a look back at each incredible decade of TecDoc's rich history.

- **The 1990s: The Foundation of Innovation**
- **The 2000s: Growing and Going Online**
- **The 2010s: A Decade of Digital Transformation**
- **The 2020s: Pioneering the Future**

Now we are in the 2020s: The automotive industry is evolving rapidly. The need for high-quality data to identify and order products is growing fast due to expanding digitisation. TecDoc is taking the lead in improving data quality through its Data Quality Management Initiative (DQM). With the increasing complexity of vehicle configurations and the demand for faster product launches, real-time data processing is now essential in the automotive industry. TecDoc introduces the new TecDoc EcoSystem, revolutionising how businesses access, manage, and process catalogue data. At the core of this ecosystem is Instant Data Processing (IDP), which provides immediate data updates, replacing the outdated quarterly or monthly submissions.

Looking ahead, we are excited about the added value TecDoc solutions will bring. We are actively working to provide a B2B e-commerce solution (TecDoc Trade Portal and its Storefronts) for parts manufacturers and distributors to accelerate or upgrade their e-commerce businesses.

- **Here's to the Next 30 Years of Data Excellence!**

TecDoc is connected with almost all key players in the IAM, enabling cooperation among parts manufacturers, traders and workshops.

As we reflect on the past 30 years, we want to say a huge thank you to everyone who's been a part of our journey. We couldn't have done it without you! We have committed to keep innovating and providing top-notch service as we move forward with the new TecDoc EcoSystem. Together with you, we are shaping new industry standards and navigating the complexities of the automotive world.

2024 China Marketing Communication Roadmap



“Go to market”

30
YEARS

TecDoc

- Supplier Connection Event (HT Auto), Hanoi 16-17 March
- Auto Maintenance & Repair (AMR) Tianjin, 20-23 March
- Australian Auto Aftermarket Expo Melbourne 11-13 April
- Taiwan Customer Day, Taipei: 16 April
- Go-to-Market Data Supplier Conference Shanghai 18 April
- AMPA 2024, Taipei:17-20 April
- International Seminar on South Korea’s Automotive Industry, Dangjin: 3 May
- CAPAS Chengdu:16-18 May
- INAPA Indonesia, Jakarta: 15-17 May
- Indonesia Customer Day, Jakarta: 10 June
- Mexico Automechanika: 10-12 July
- International Auto Parts and Aftermarket Exhibition (Guangzhou) 28-30 August
- 2024 the 4th China (Wenzhou) International Auto Parts Expo, 5-7 September
- Automechanika Frankfurt, Germany 10-14 September
- AAPEX Show, Las Vegas: 5-7 November
- Automechanika Johannesburg, South Africa: 19-21 November 2024
- Automechanika Shanghai (AMS) 2- 5 December
- Automechanika Dubai: 10-12 December

more...

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