



TecAlliance E-newsletter
November 2020

Content

01. Market Info

- [China Mainland](#)
- [Hongkong](#)
- [Taiwan](#)

02. TecAlliance Data

- [Vehicle Data Overview](#)
- [OES Data Overview](#)
- [RMI Data Overview](#)
- [Statistics of TecAlliance online catalogue usage](#)

03. TecAlliance Company News

- [Automechanika Shanghai 2020 is coming](#)
- [2020 TecAlliance Award Ceremony](#)
- [TecAlliance&Casstime enhanced the Strategic partnership](#)



01

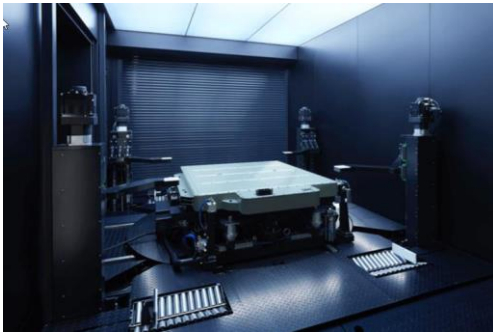
Market Info

(China Mainland /
Hongkong / Taiwan)



China Mainland Highlight Vehicle News

2020 New Energy vehicle Industry Trends



The battery swap mode of pure electric vehicles has existed in the market for many years. In recent years, more and more companies have set foot in the battery swap field. But for a long time, no relevant industry standards have been issued to regulate the development of the entire industry. A few days ago, the National Energy Administration finally released the industry standard for power exchange, which specifically includes the following five items:

NB/T 10435-2020 "General Technical Requirements for Locking Mechanisms for Quick Replacement of Battery Boxes in Electric Vehicles";

NB/T 10436-2020 "General technical requirements for the cooling interface of the battery box of electric vehicles";

NB/T 33025-2020 "General Requirements for Quick Replacement of Battery Boxes in Electric Vehicles";

NB/T 33004-2020 "Code for Construction and Completion Acceptance of Electric Vehicle Charging and Switching Facilities Engineering";

NB/T 10434-2020 "General Technical Requirements for Chassis Battery Replacement System for Pure Electric Passenger Cars".

As the first to deploy a battery swap model in China, NIO has made great contributions to the relevant standards issued this time. Specifically, the three standards of NB/T 10435, 10436 and 33025 are led by Weilai Automobile and are also deeply involved in the two standards of NB/T10434 and 33004. It is understood that the whole process from project approval to release of this batch of standards lasted more than 2 years, and the opinions of hundreds of relevant persons and units have been collected.

Since Weilai launched its first power station replacement on May 20, 2018, it has been well received by the majority of Weilai car owners. Judging from the data released by Weilai Automobile, as of October 5 this year, Weilai users have accumulated more than 1 million battery exchanges, which shows the popularity of its business. Of course, this is also in line with the "free battery exchange" previously launched by Weilai. "The policy is related. In the subsequent development process, with the gradual improvement of industry standards and the in-depth participation of more companies, the power exchange model will usher in faster and better development.

China Mainland Highlight Vehicle News

2020 New Energy vehicle Industry Trends

On October 6, Prime Planet Energy & Solutions, a joint venture established by Toyota and Panasonic, announced that it will substantially increase the production capacity of lithium-ion batteries, mainly to meet Toyota's future development goals for new energy vehicles.

The company made it clear in an official statement that the newly expanded battery production line at the Tokushima plant in Japan will be dedicated to the production of square lithium-ion batteries for hybrid vehicles. It is planned to start production in 2022 and gradually increase it to the level of equipped with about 500,000 hybrid vehicles each year, but the official did not specify the specific hybrid form of the supply model.

At the Beijing International Auto Show not long ago, Toyota stated that it will achieve the annual sales target of 5.5 million new energy vehicles in 2025, five years earlier than the original plan. This initial plan refers to Toyota's announcement in 2017 that by 2030, the brand's new energy vehicles will reach 5.5 million/year sales target, including 4.5 million hybrid vehicles (including plug-in hybrids). And 1 million electric and hydrogen fuel cell vehicles. However, although the new plan does not specify the target proportion of each type of car, it is certain that hybrid models still occupy a large proportion.



According to data, Toyota holds 51% of the shares in Prime Planet Energy & Solutions, and all the remaining shares are owned by Panasonic. The company's current main business scope involves the development, manufacturing and sales of large-capacity and high-output automotive prismatic lithium-ion batteries, and of course, it also includes the development of future new automotive batteries. The company currently has about 5,100 employees, including 2,400 in the Chinese subsidiary. According to clues, it is likely that Panasonic has incorporated its Taixing Energy Solutions Co., Ltd. in Dalian, China.

China Mainland Highlight Vehicle News

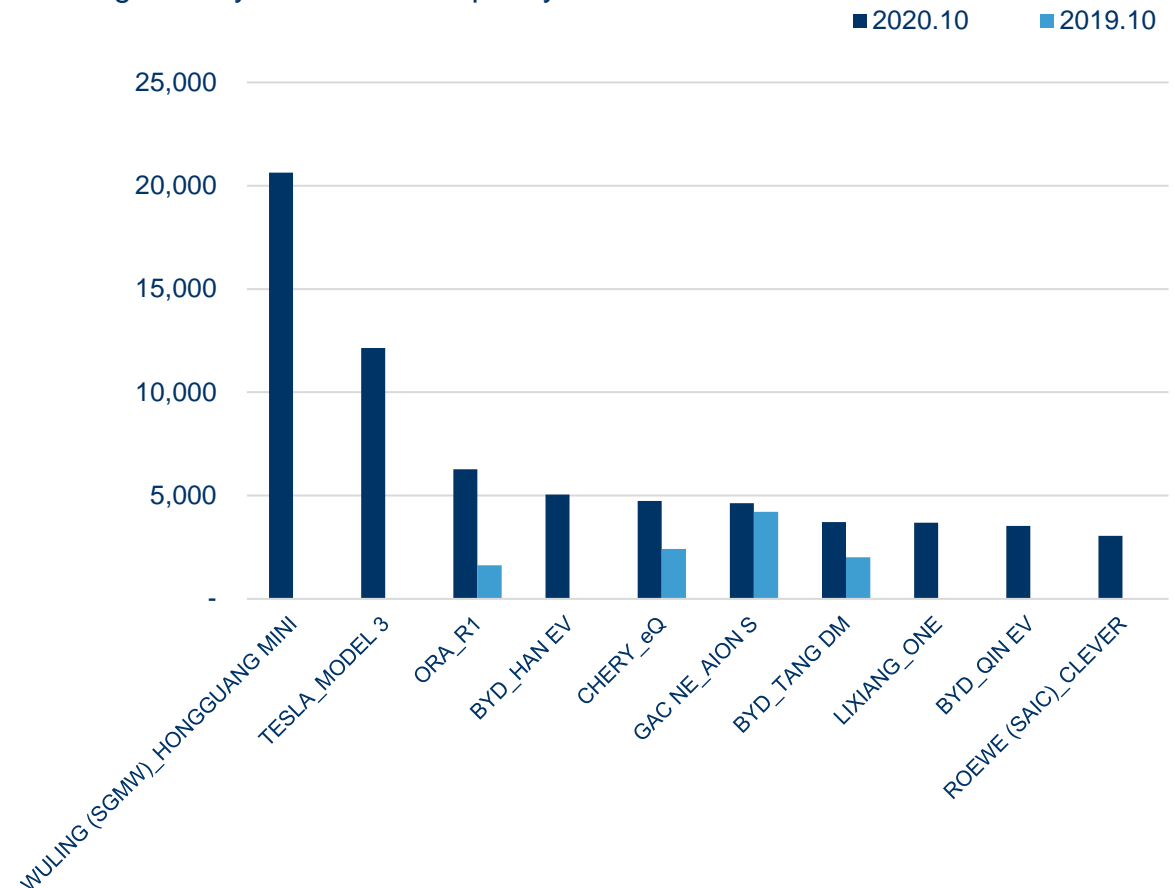
Top 10 New Energy Vehicles sales rankings in Oct 2020



- | | |
|---------------------------------|-------------------------|
| 1. WULING (SGMW)_HONGGUANG MINI | 6. GAC NE_AION S |
| 2. TESLA_MODEL 3 | 7. BYD_TANG DM |
| 3. ORA_R1 | 8. LIXIANG_ONE |
| 4. BYD_HAN EV | 9. BYD_QIN EV |
| 5. CHERY_eQ | 10. ROEWE (SAIC)_CLEVER |

Sales comparison

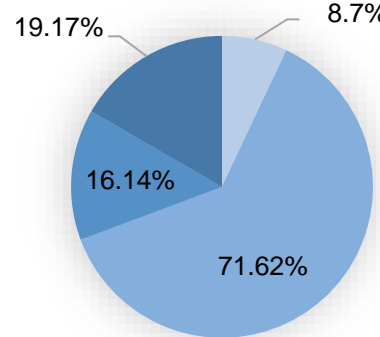
With the listing of Wuling Hongguang MINI, it can be seen from the sales that it has completely surpassed Tesla to top the list. It is amazing that a mini-electric vehicle that does not meet the new energy subsidy standards can be recognized by the market so quickly.





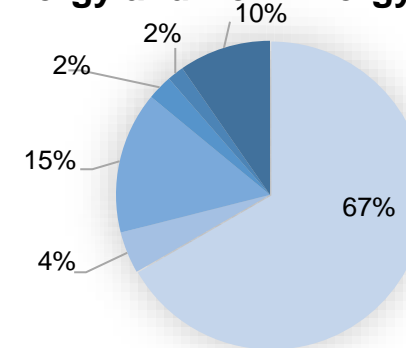
China Mainland October New vehicle Analysis

New vehicle statistics



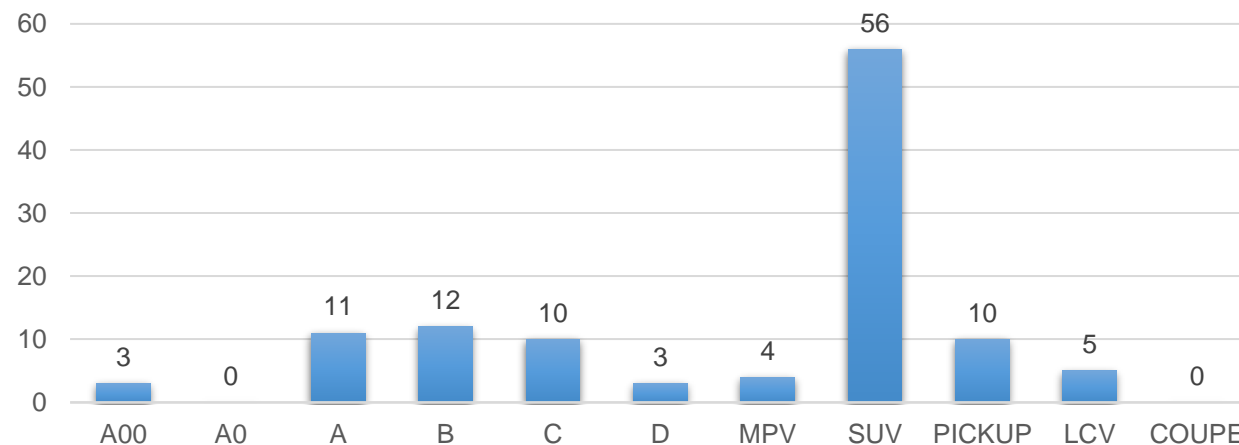
■ New generation ■ Facelifted ■ New type ■ New Model

Traditional Energy and New Energy Vehicles Statistics

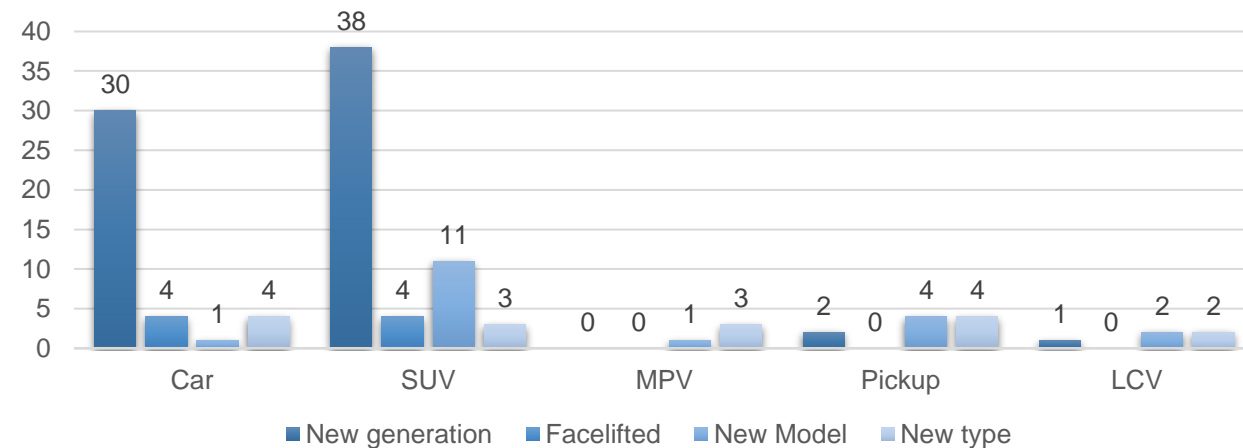


■ Petrol ■ Diesel ■ EV ■ HEV ■ PHEV ■ MHEV

Level statistics



Market segment type statistics

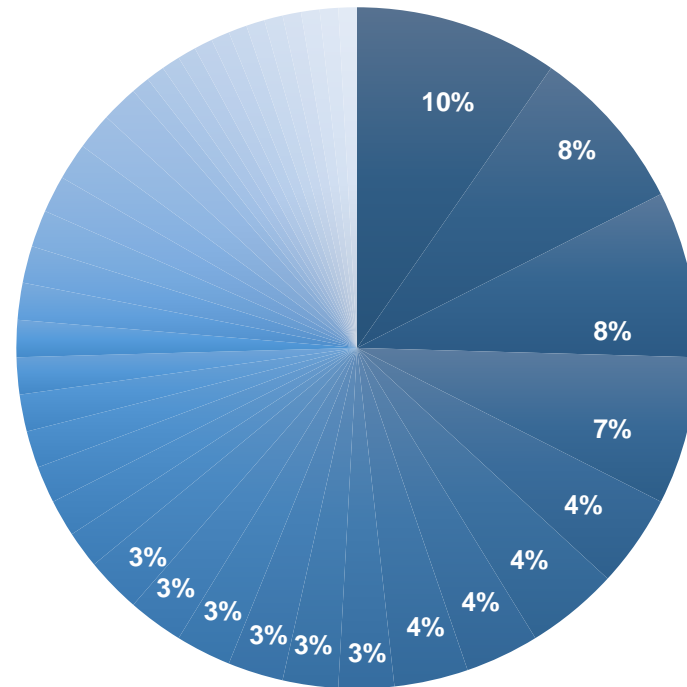


■ New generation ■ Facelifted ■ New Model ■ New type

Remarks:
 All statistical data is based on K-Type. In October 2020, the total coverage of K-Type was 114, of which 43 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

NEW

New Car – China Mainland Nov 2020



- AUDI
- BMW
- JAC
- MERCEDES-BENZ
- TESLA
- VW (SVW)
- FENGXING
- ZEDRIV
- CHERY
- HUANGHAI
- LAND ROVER
- LEXUS
- MASERATI
- MG (SAIC)
- ARCFOX
- BMW (BRILLIANCE)
- CADILLAC (SGM)
- DONGFENG (DFAC)
- EXEED (CHERY)
- FORD (CHANGAN)
- GAC
- GEELY
- HYUNDAI (BEIJING)
- JETOUR
- NISSAN (DFAC)
- ROLLS-ROYCE
- SWM MOTORS
- VENUCIA
- BAOJUN (SGMW)
- BYD
- CHANGAN
- DS (CAPSA)
- FENGON
- FQT MOTOR
- KIA (DYK)
- ORA
- ROEWE (SAIC)
- SKYWELL
- TOYOTA (GAC)
- VOLVO
- WULING

CHINA VIO REPORT

China Mainland



VIO until 2019 H2

VEHICLES IN OPERATION
221,816,101

KTYPE WITH VIO
6728

VEHICLE BRANDS
273

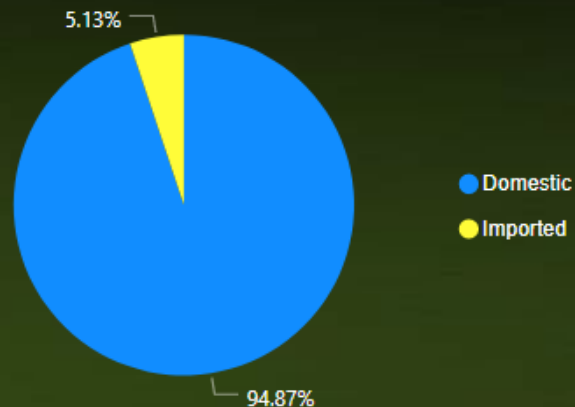
VIO BY VEHICLE SEGMENTS

INFORMATION

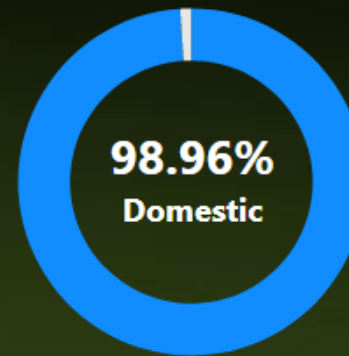
DOMESTIC & JOINT VENTURE CAR
INCLUDES BRAND WHICH ARE PRODUCED IN CHINA
SUCH AS BYD, GEELY, VW (SVW), TOYOTA (GAC) & ETC

IMPORTED CAR

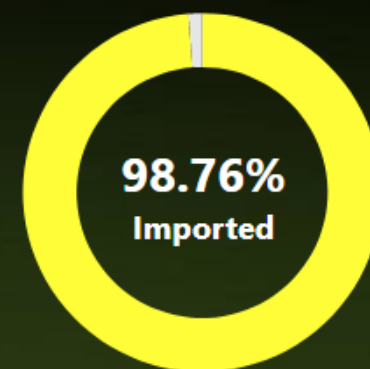
INCLUDES BRAND WHICH ARE NOT PRODUCED IN
CHINA SUCH AS VW, PORSCHE, LAND ROVER & ETC



K-TYPE / VIO COVERAGE BY SEGMENT



210.5M
VIO COVERED



11.3M
VIO COVERED

TOP1 VEHICLE BASED ON VIO



上汽大众
SAIC VOLKSWAGEN



VW (SVW)

LAVIDA

VIO OF TOP1 VEHICLE
1,917,829

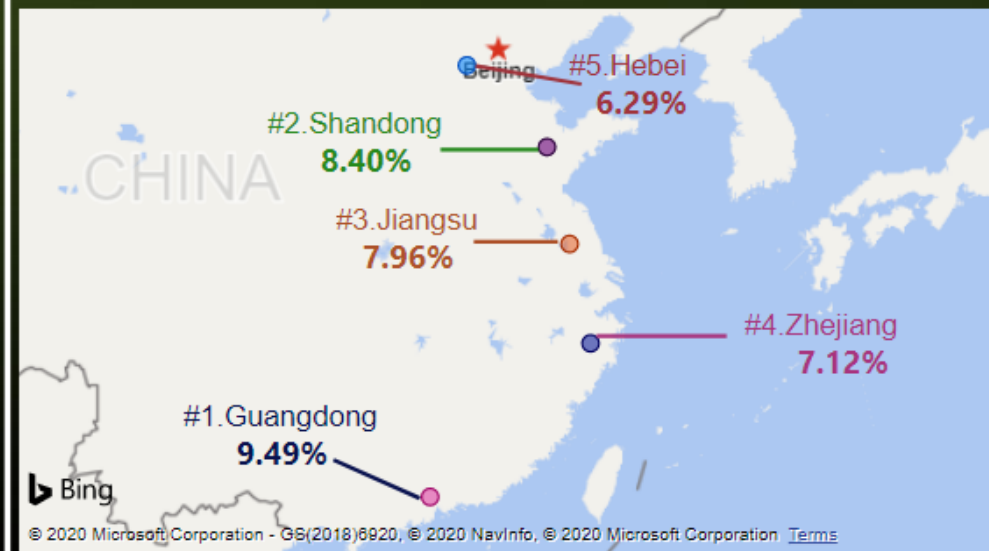
POPULATION SHARE
0.86%

TREND OF ANNUAL REGISTRATION FROM 2005 TO 2019



TOP 5 PROVINCES BY VIO

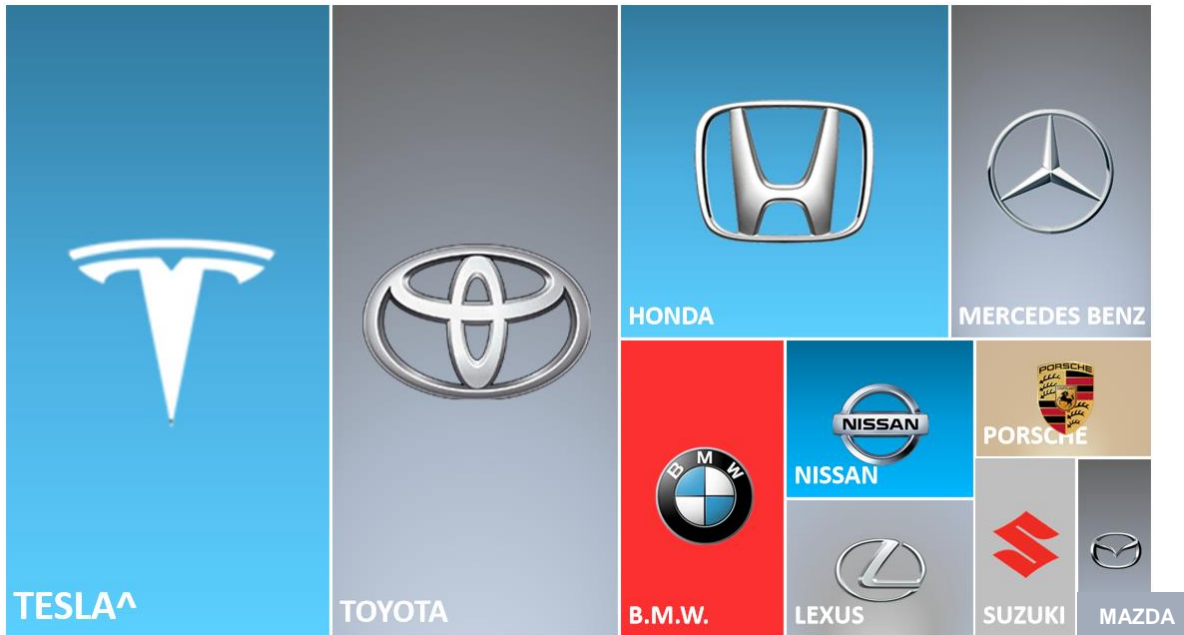
(Dated from 1999 to 2019)



Hong Kong Highlight Vehicle News

Hong Kong October 2020 Vehicle News

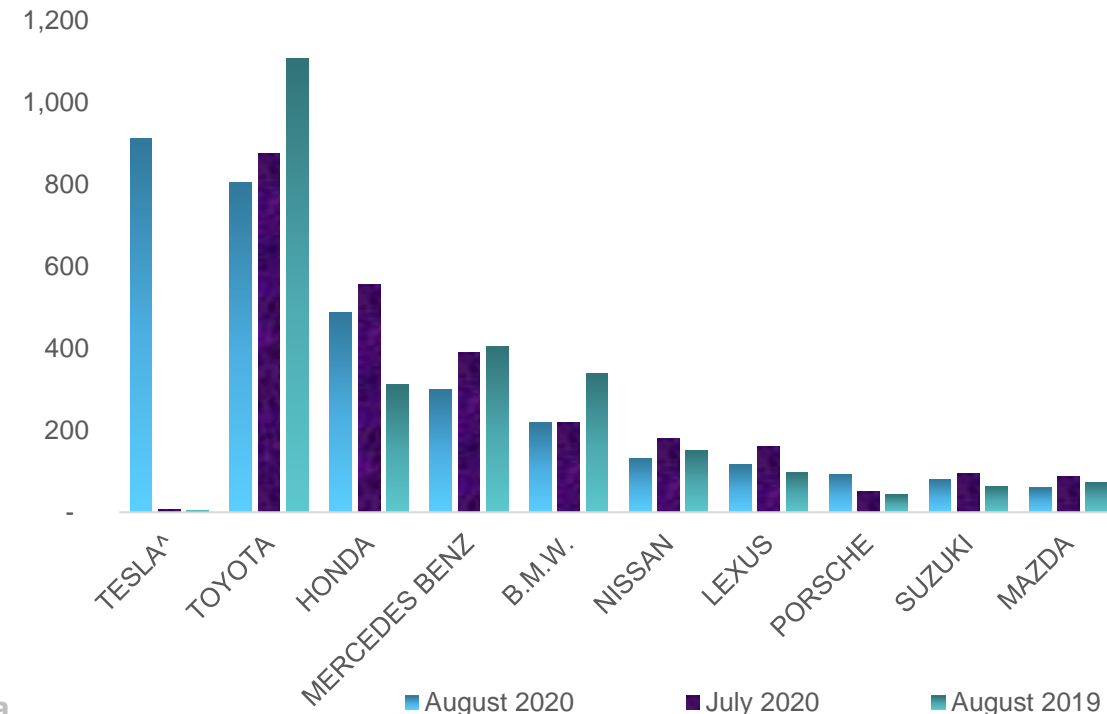
The current epidemic situation in Hong Kong has been in a stable state, and sales in the auto market have continued to rebound. Passenger car sales were 3257 units in August 2019 and 3550 units in August 2020, a year-on-year increase of 9%. Tesla sold 912 units this month, making it the most popular car brand in Hong Kong. At the same time, Model 3 has also become the highest-selling passenger model in the region, surpassing other fuel and electric passenger vehicles. Toyota retreated to second place for the first time this year with 806 sales, a month-on-month decrease of 8%. Honda's sales ranked third, down 12.4% from the previous month. Mercedes-Benz sales fell 23.3% from the previous month, ranking fourth. BMW's sales this month remained unchanged from the previous month, ranking fifth. The sales of the remaining top ten brands are basically at the monthly average level, and the sales of the entire automobile market as a whole exceed the level of the same period last year.



Hong Kong Sales Comparison

The situation of the new crown epidemic is stable, and car sales are rising overall

In August, thanks to advanced intelligent technology, excellent driving performance and safety performance, Tesla won the favor of the majority of Hong Kong consumers. Sales of Toyota, Honda, and Mercedes-Benz declined slightly from the previous month. Due to the rapid increase in sales of Tesla, the rankings were moved one place each. Although BMW's sales volume remained unchanged this month compared with the previous month, the ranking also moved one place back to fifth place. The sales of the remaining brands are slowly picking up year-on-year, and overall car sales have risen overall.



HONG KONG VIO REPORT

Hong Kong (China)



VIO until 2019 H1

VEHICLES IN OPERATION

725,478

KTYPE WITH VIO

3571

VEHICLE BRANDS

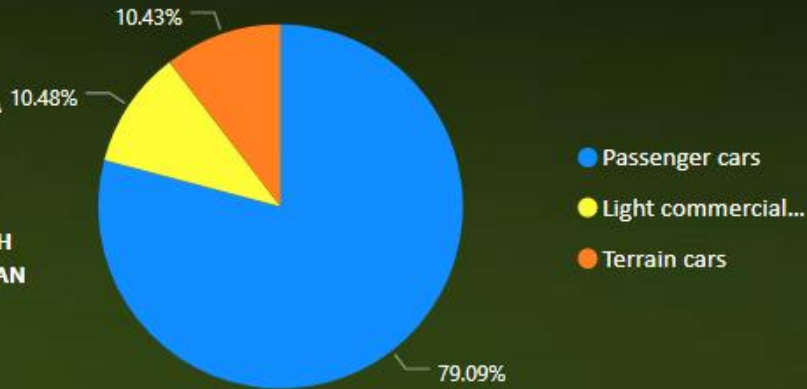
65

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

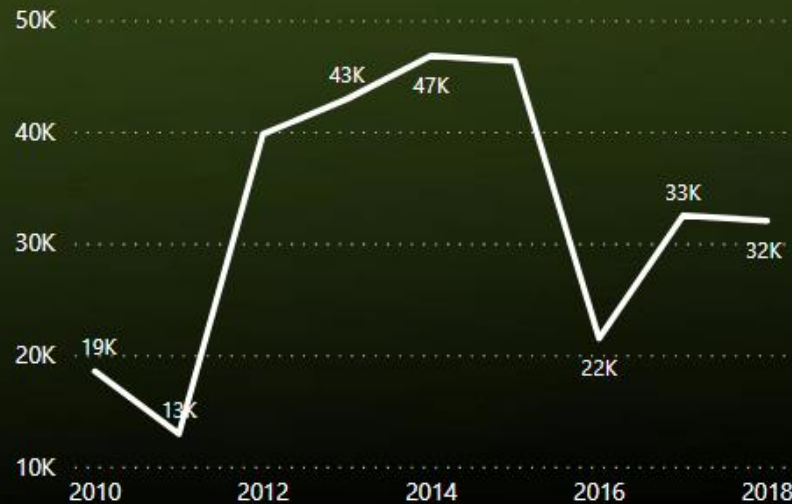
VIO OF TOP1 VEHICLE

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 October 2020

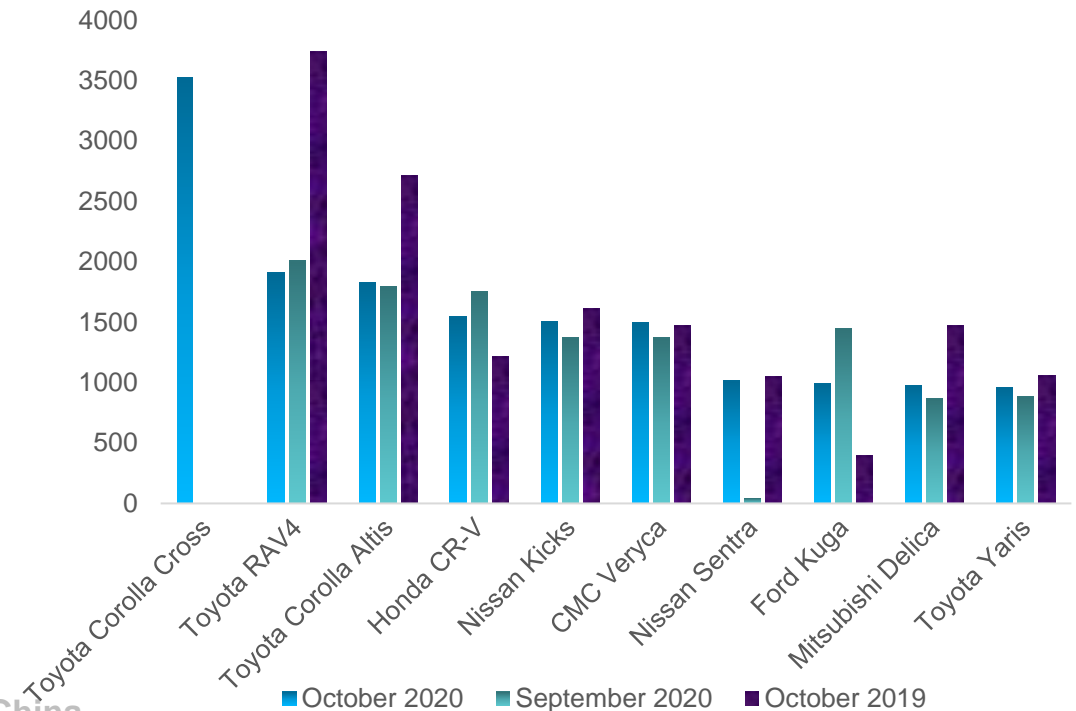


The most eye-catching focus of the October 2020 car sales report is definitely the Toyota Corolla Cross, which delivered up to 3,521 vehicles in October, and easily won the October sales champion in the total market at its debut and became a new generation of sales divine chariot. With the help of Corolla Cross's large number of vehicles delivered in the first month, the total market new car sales in October reached 39,792, which was close to 40,000. Compared with September, the growth rate reached 6.8%. The cumulative sales volume for the first October of the year was 365,598, which was a 3.5% increase compared to the cumulative sales volume in the same period of 2019. Corolla Cross's first month sales performance is not only outstanding. Corolla Cross, which represents the new force of domestic cars, grabbed about 8.9% of the total market share in October. It also directly affected the growth and decline of the domestic and imported sales camps. With the concerted efforts of Toyota Corolla Altis, Honda CR-V, Nissan Kicks, Nissan Sentra, and CMC Veryca, it has broken thousands of domestically-made best-selling vehicles, the monthly sales of domestically-produced vehicles have been advanced to 57.8%, successfully reversing the previous stalemate. The import camp is facing up to 50%.

Taiwan Sales Comparison

Significant increase in new car market sales

This month's sales champion was won by the debut Toyota Corolla Cross with 3521 units, while the imported Toyota RAV4 retreated to second place with 1,909 units this month. The sales volume fell 5.1% month-on-month and sales plummeted 48.9% year-on-year. The domestically produced Toyota Corolla Altis ranked third with a good score of 1,832 vehicles, with sales up 1.9% month-on-month and sales down 32.5% year-on-year. The Honda CR-V ranked fourth with 1,544 units, with a month-on-month sales decrease of 11.9% and a year-on-year sales increase of 27.1%. Nissan Kicks ranked fifth with 1,507 vehicles sold this month, and China Veryca ranked sixth with 1,496 vehicles. Finally, Nissan Sentra, Ford Kuga, Mitsubishi Delica, Toyota Yaris ranked seventh, eighth, ninth and tenth respectively with 1,015, 989, 980, and 960 vehicles. Overall, Taiwan's new car market sales have increased significantly.



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

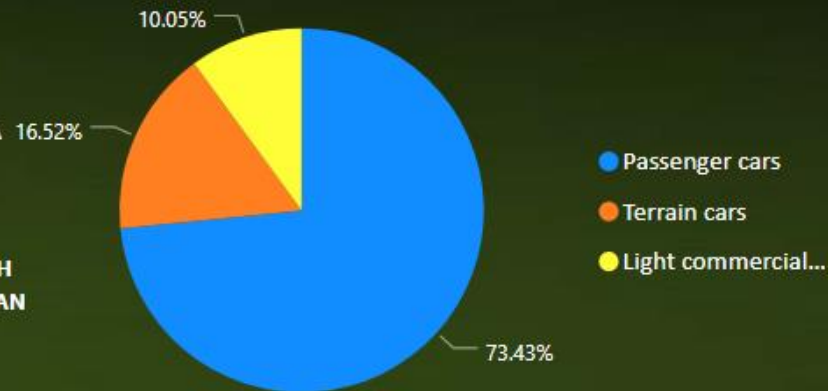
INFORMATION

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



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

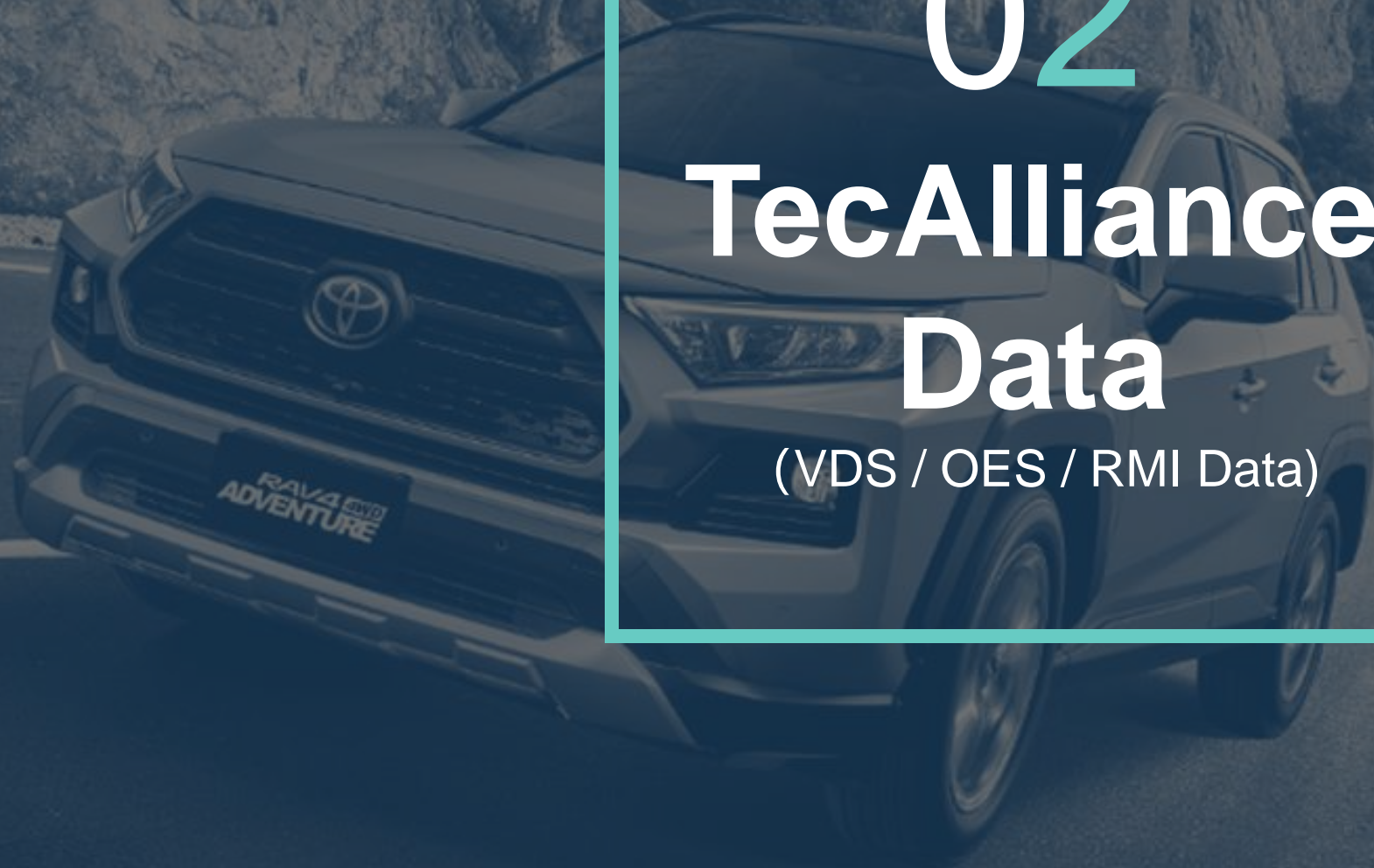


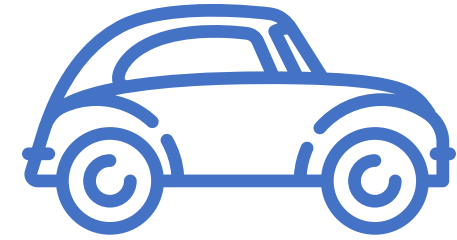
Back

02

TecAlliance Data

(VDS / OES / RMI Data)



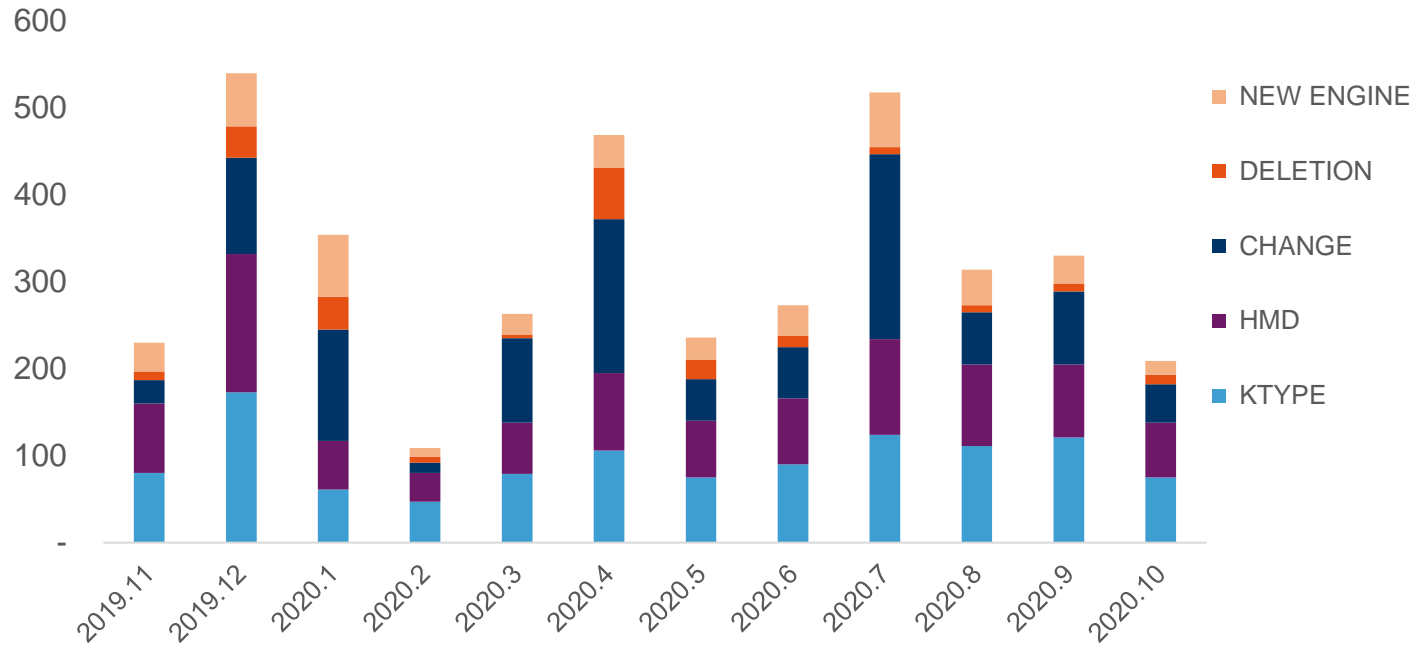


Vehicle Data Overview

TecAlliance Vehicle Team Dash Board

VDS Monthly Dashboard

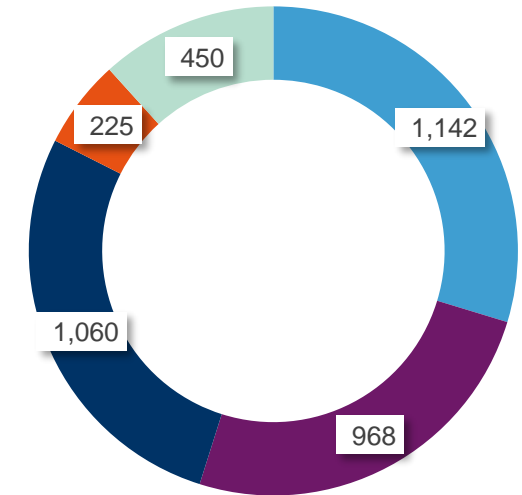
2019 Nov – 2020 Oct



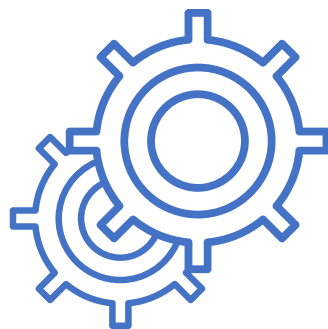
YEAR	2019	2019	2020	2020	2020	2020	2020	2020	2020	2020	2020	2020
MONTH	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT
KTYPE	80	173	61	47	79	106	75	90	124	111	121	75
HMD	80	159	56	33	59	89	65	76	110	94	84	63
CHANGE	27	111	128	12	97	177	48	59	213	60	84	44
DELETION	10	36	38	7	4	59	22	13	8	8	9	11
NEW ENGINE	33	61	71	10	24	38	26	35	63	41	32	16

Latest K-type numbers (China Mainland): 8986

2019 Nov – 2020 Oct









- 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



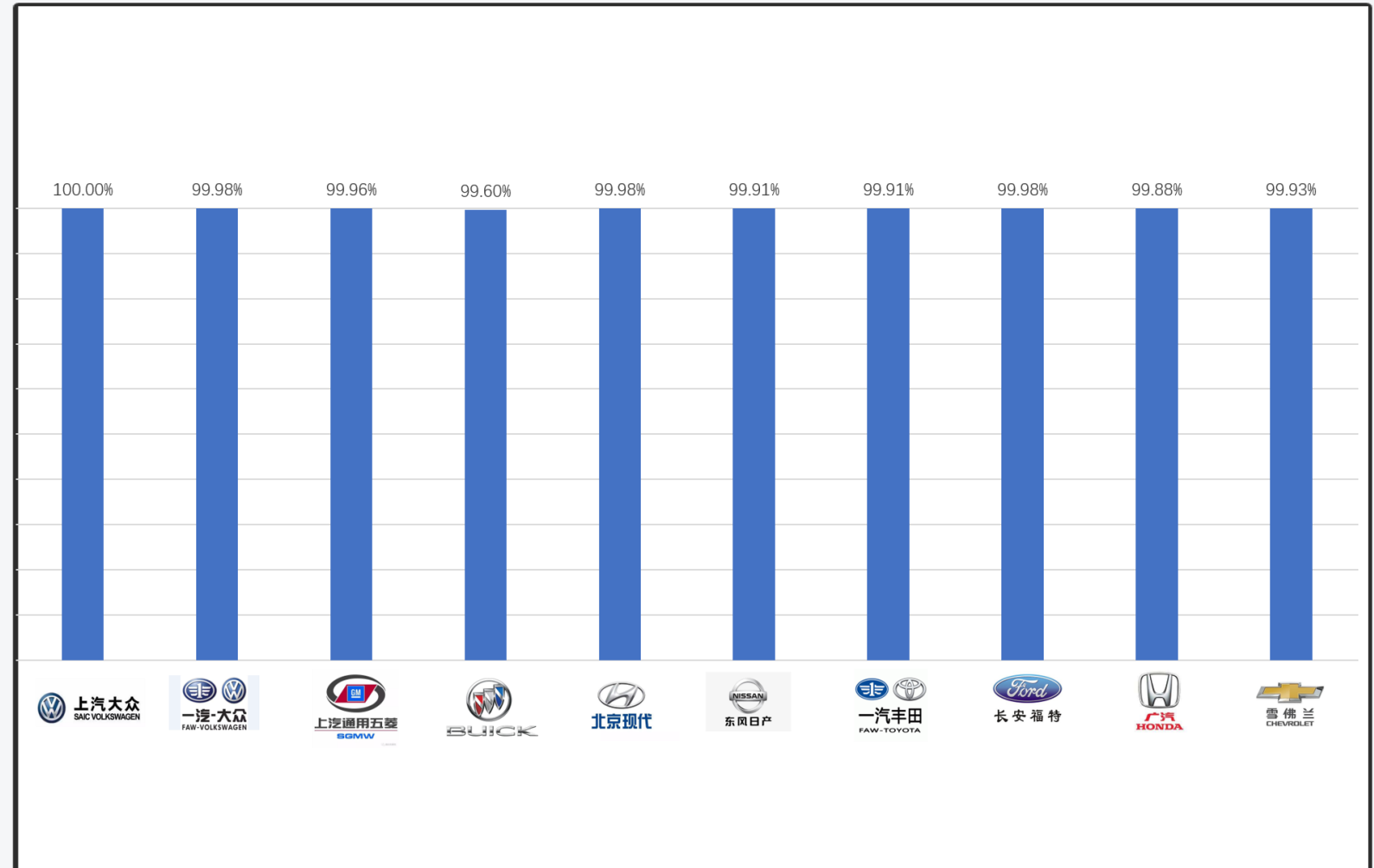
New launched vehicles & OE numbers (Selection)

Brand	Sales Designation	Engine Capacity (litre)	Engine Type	Construction From (M/D/Y)	Maximum output (KW)	Maximum output (HP)	Oil Filter (GA7)	Air Filter (GA8)	Filter interior air (GA424)
 HYUNDAI (BEIJING)	ELANTRA	1.4	Petrol Engine	10/1/2020	103	140	263003****	28113F****	97133F****
 HYUNDAI (BEIJING)	ELANTRA	1.5	Petrol Engine	10/1/2020	85	116	263502****	28113F****	97133F****
 AUDI	A6	2.9	Mild Hybrid	10/1/2020	331	450	06M198****	4K0133****	4M0819****
 AUDI	A7	2.9	Mild Hybrid	10/1/2020	331	450	06M198****	4K0133****	4M0819****
 VENUCIA	T90	1.5	Mild Hybrid	10/1/2020	140	190	152082****	165462****	272772****
 VENUCIA	T90	1.5	Petrol Engine	10/1/2020	140	190	152082****	165462****	272772****

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

Ignition System Coverage

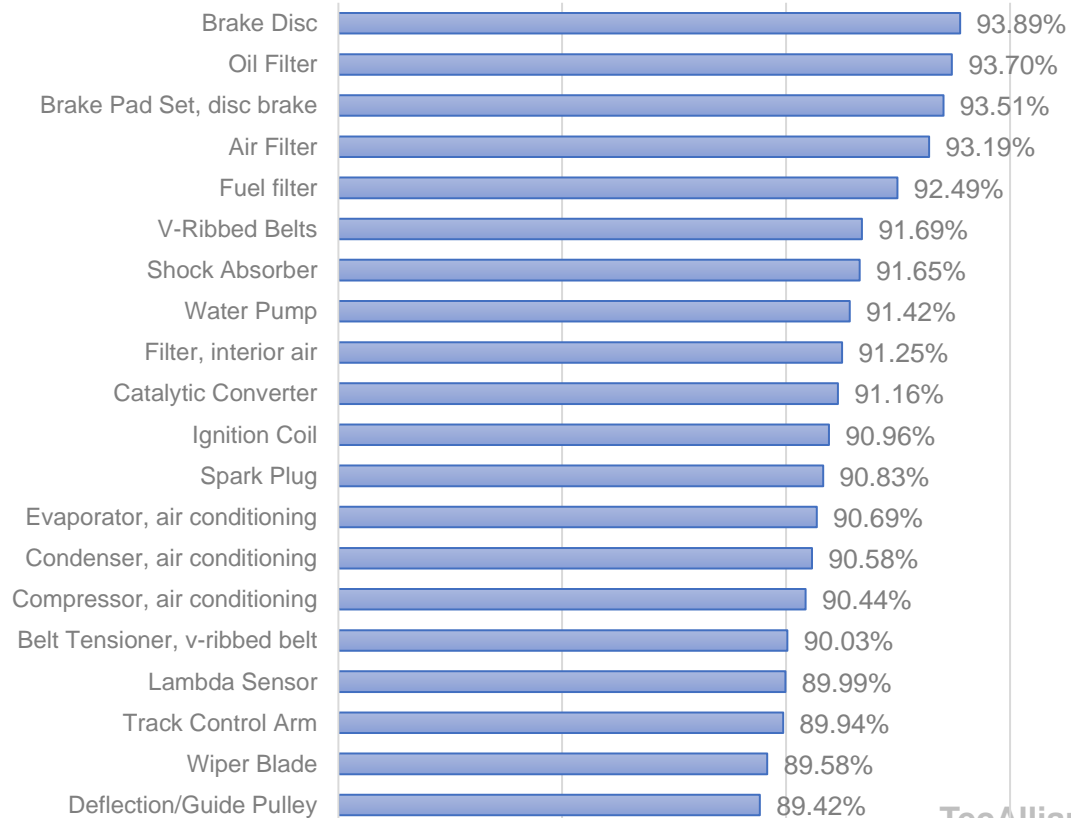
*based China
2020 VIO*
229M
*(K-type
Coverage) &
Manufacturers*



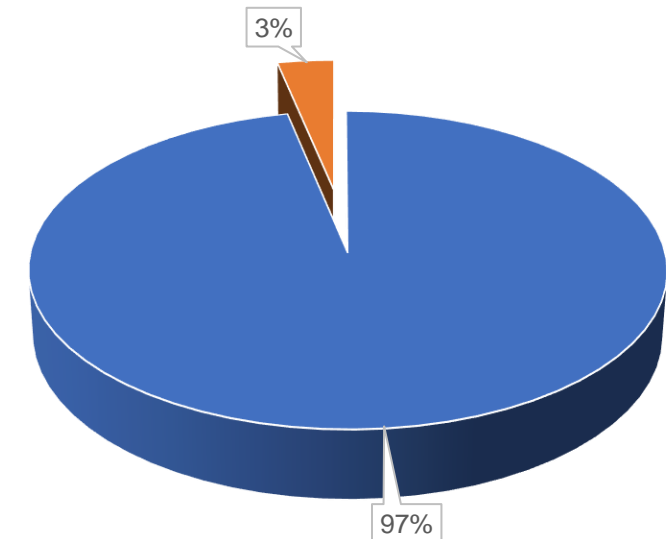
Data on-hand by Generic Article (GA)

K-type coverage by Generic Article(GA) is based on China 2020 VIO 229M & Availability of EPC

Top 20 GA



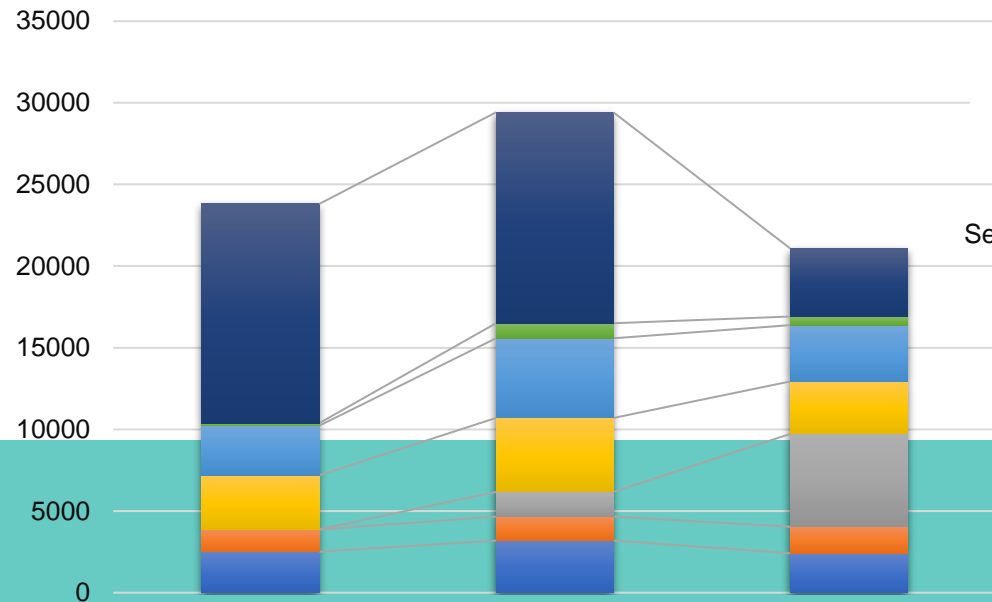
VIO coverage (based on acquired EPC)



■ Cleared 221M
■ Uncleared 8M

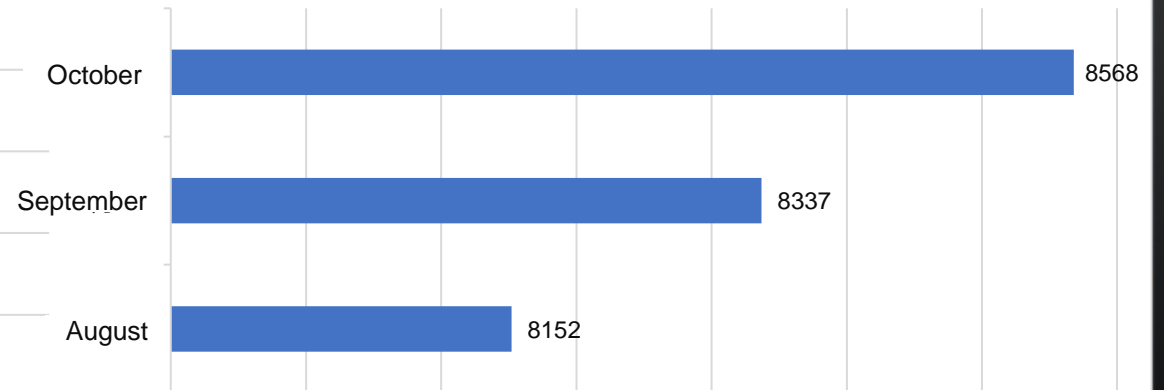
New OE to Ktype Linkages by Month

PADS Team Dashboard

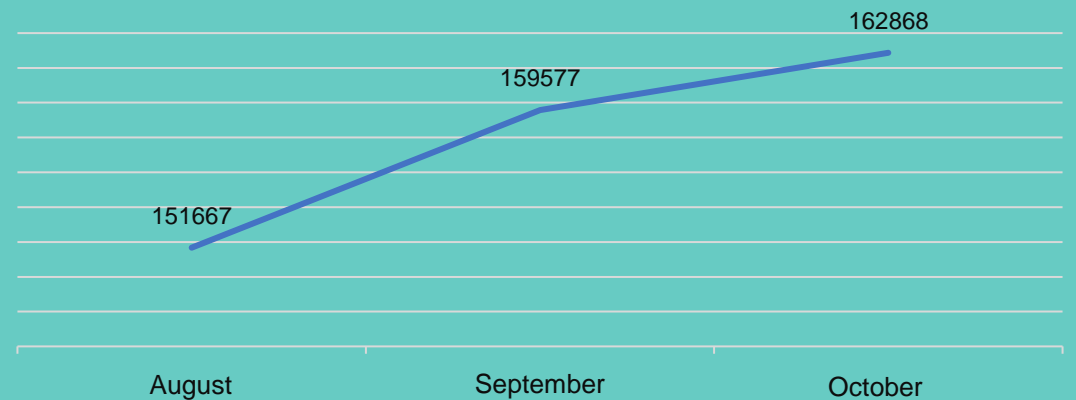


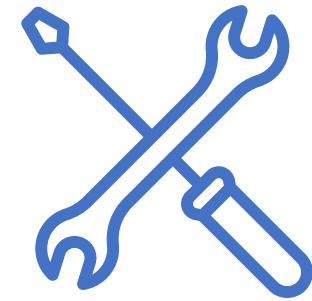
	August	September	October
Steering & Suspension	13421	12907	4161
Ignition	163	919	532
Glazing	3037	4872	3463
Exhaust	3302	4535	3202
Engine & Sealing Products	29	1503	5693
Cooling	1355	1461	1619
Braking & Hydraulics	2504	3204	2412

Total K-type matched OE number



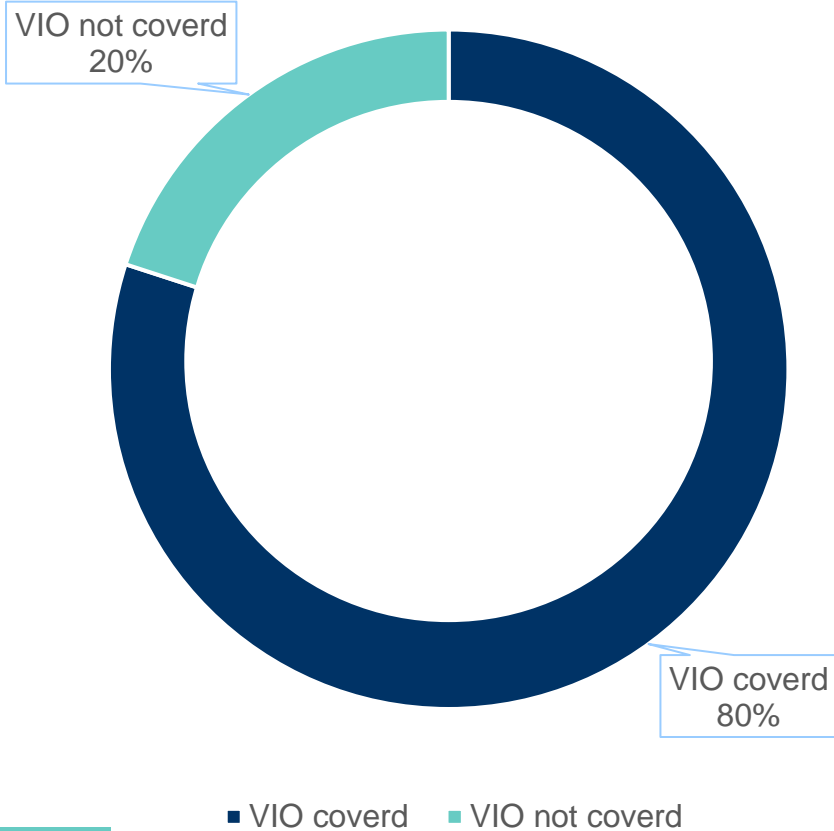
Total OE number matched to K-type





RMI Data Overview

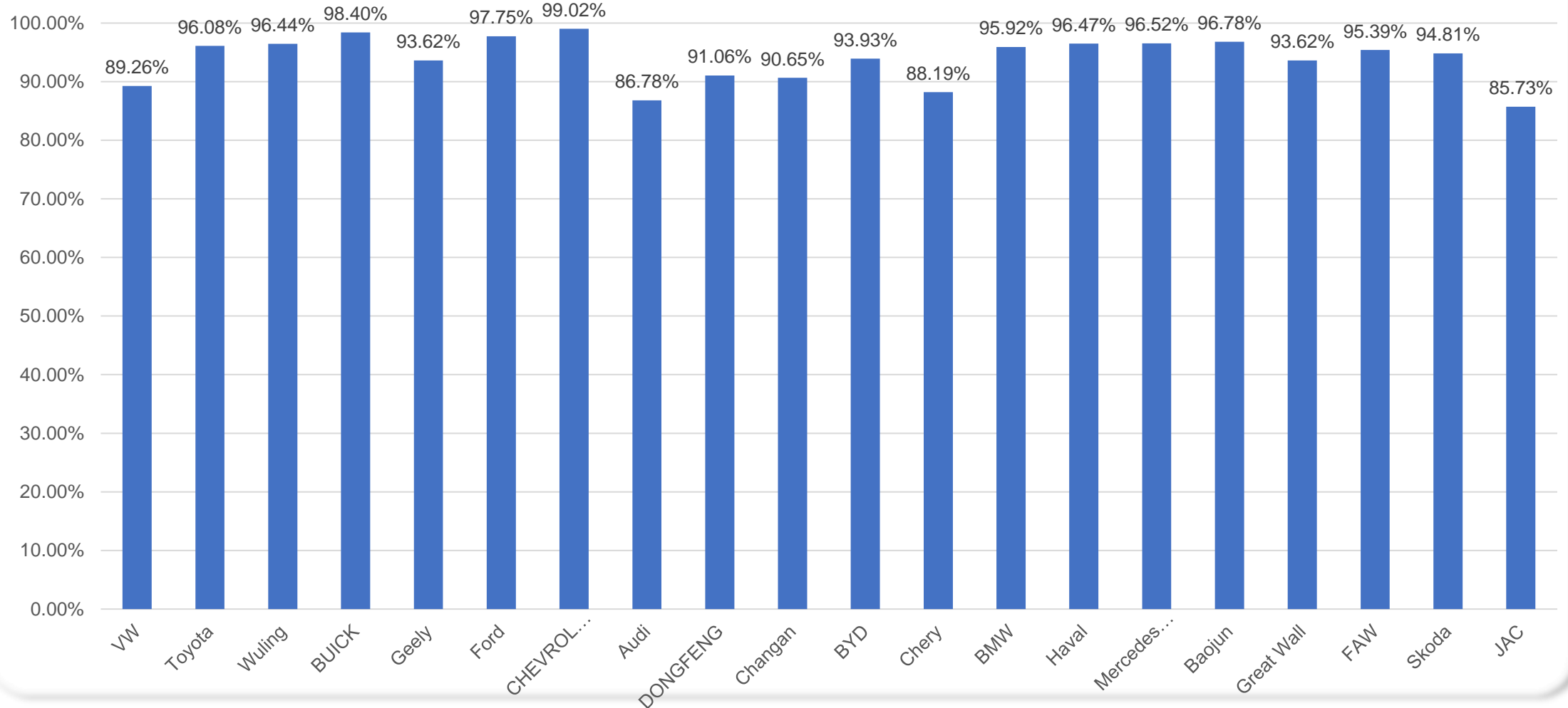
TecRMI Data Overview (maintenance)



80%
183M Vehicles
of 229M 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
~95% of VIO



Brake Fluid
~80% of VIO



Coolant
~70% of VIO



A/C Refrigerant
~65% of VIO



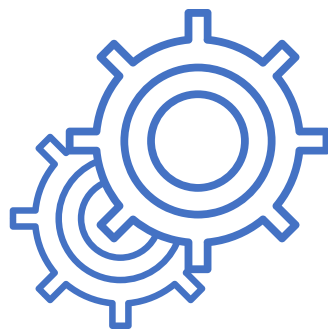
Others Available on Demand
axle oils, steering oil etc.

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

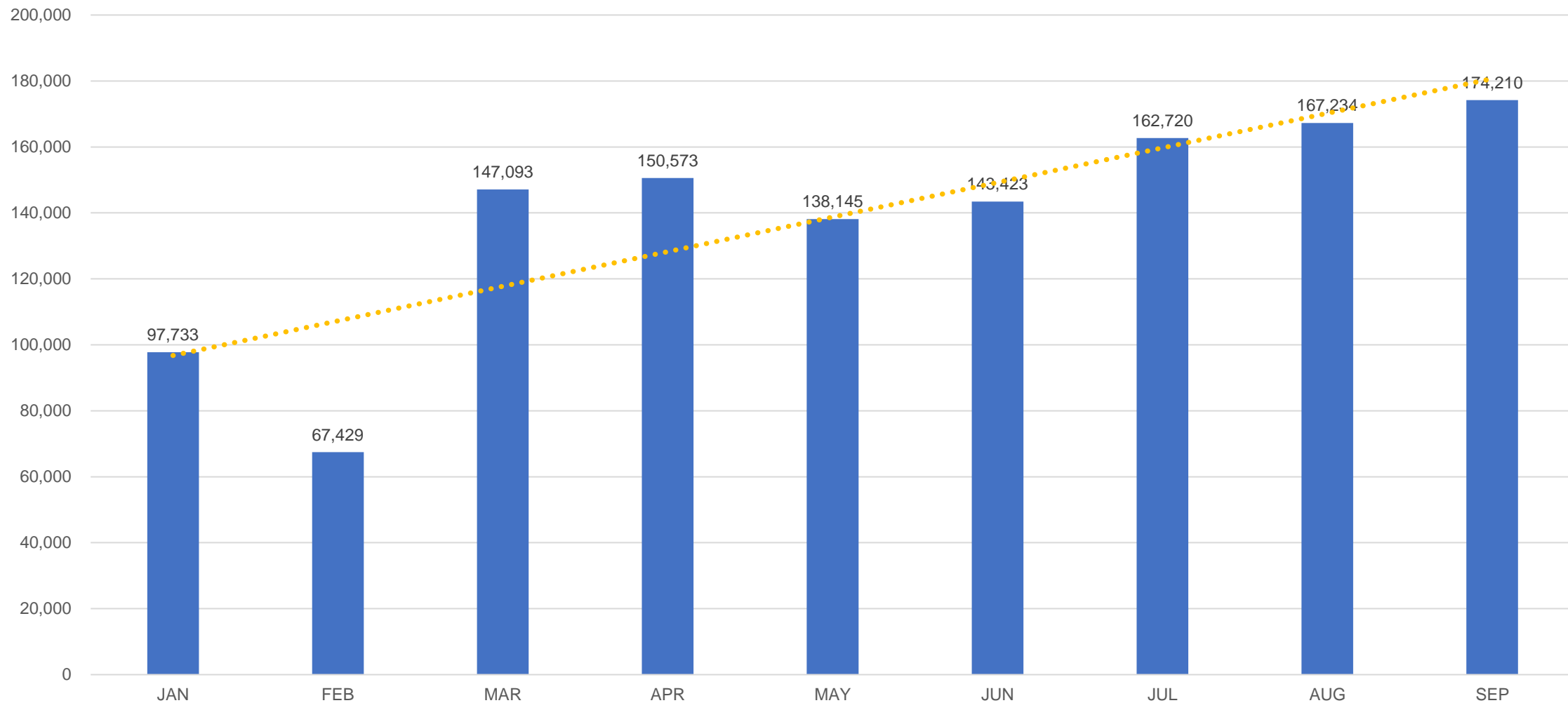




Statistics of TecAlliance online catalogue usage

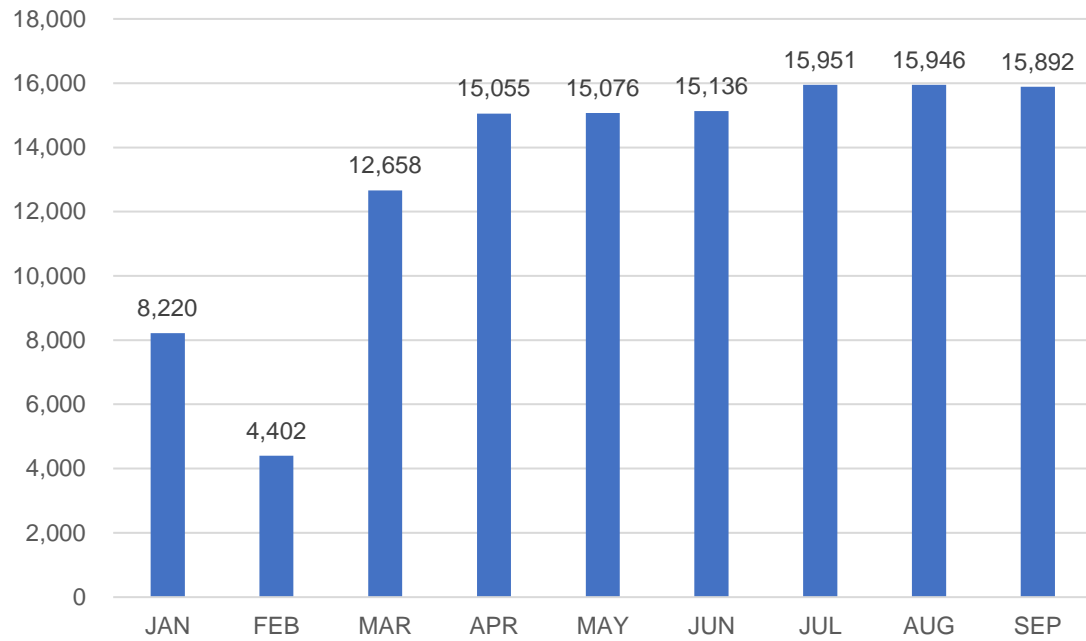


Overview of TecAlliance online catalogue page views 2020(Web+WeChat)



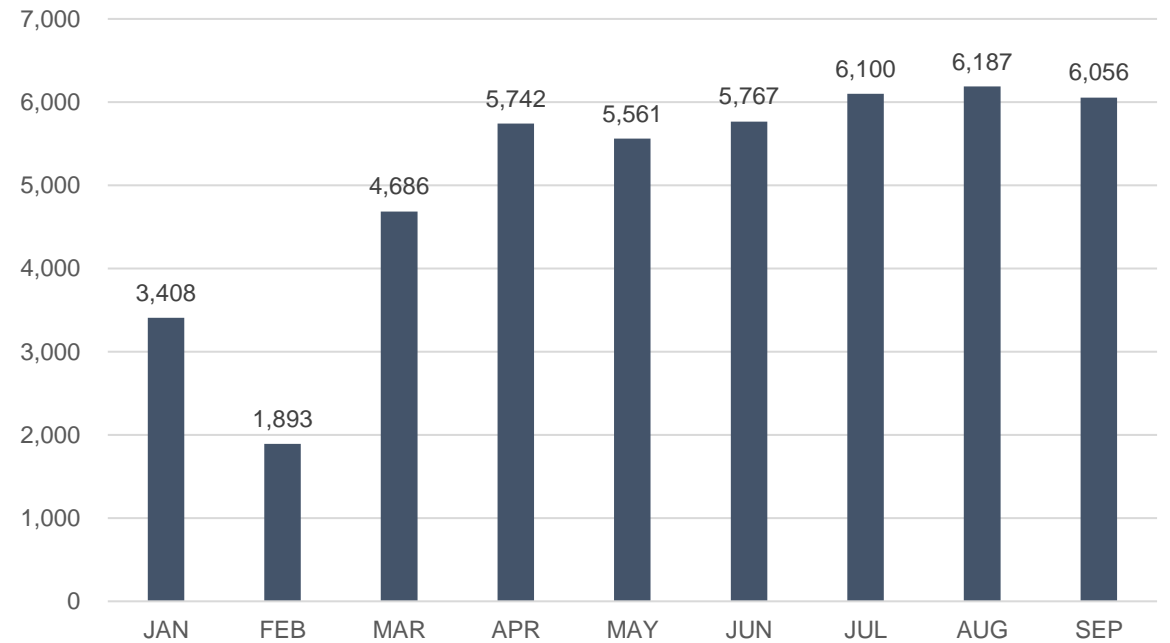
WeChat Catalogue

Visits



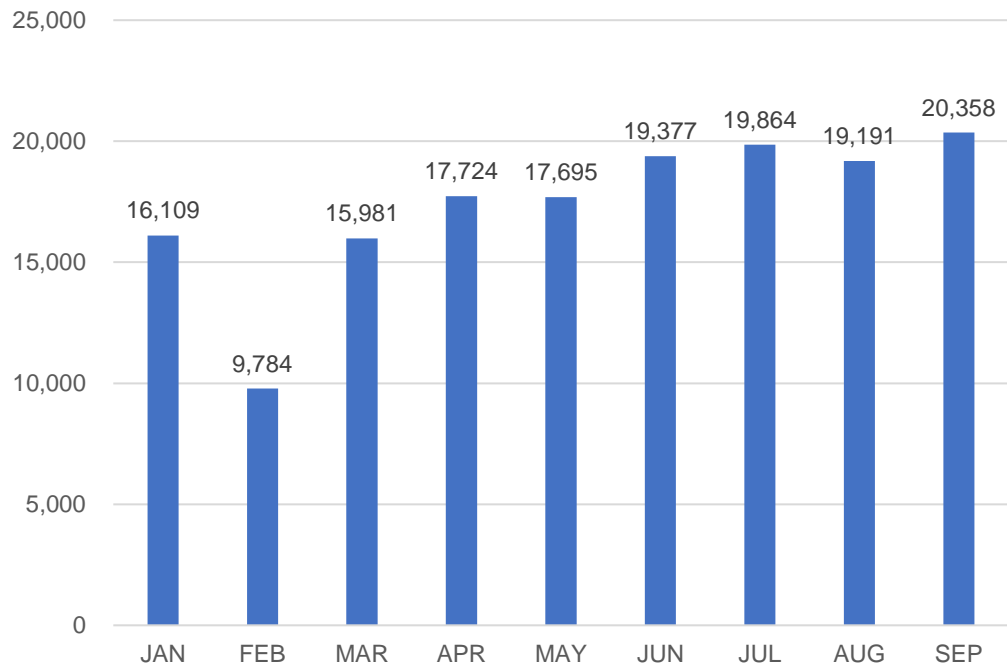
* Statistics of visits: all the actions of a user within 30 minutes are recorded as one visit

Users



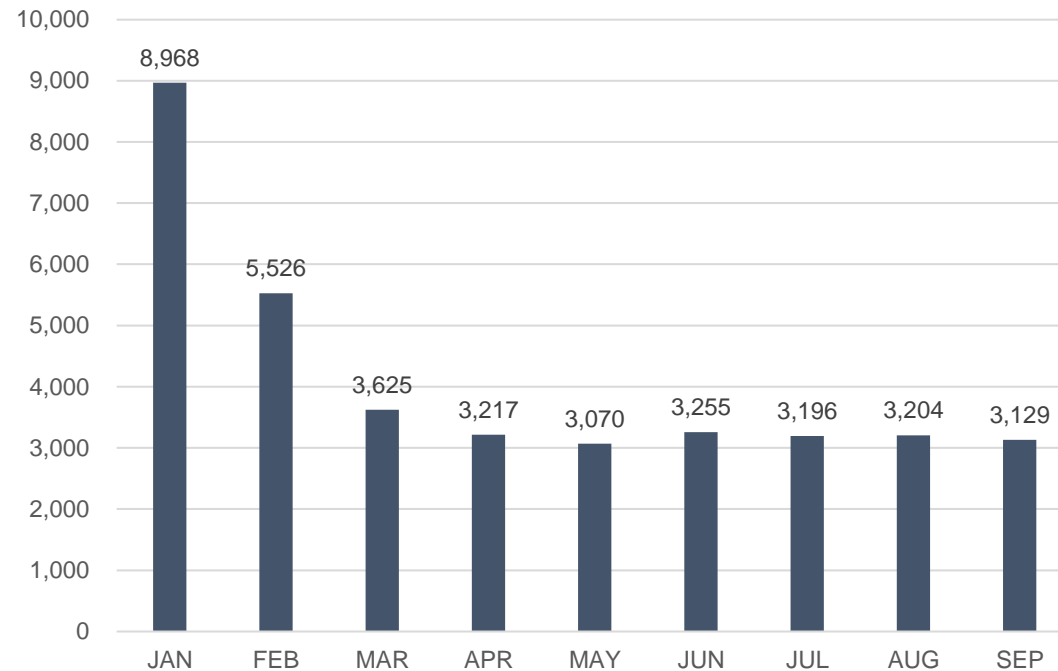
Web Catalogue

Visits



* Statistics of visits: all the actions of a user within 30 minutes are recorded as one visit

Users



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Parts manufacturer China



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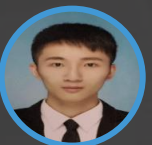
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Global Web Catalogue



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03

**TecAlliance
Company
NEWS**



Company News

Automechanika Shanghai 2020 is coming

The more difficult, the harder we work!

To show our willingness to fight together with our customers to go through the difficult time caused by COVID-19, we decided to present at this year's Automechanika Shanghai with new solutions and services.

Never stop matching no matter what happens...



The invitation card features a dark blue background with a stylized cityscape of Shanghai, including the Oriental Pearl Tower. The TecAlliance logo is in the top left corner. The main text is in white and Chinese characters. At the bottom, there is contact information for TecAlliance (China) and a QR code.

TecAlliance

邀请函
INVITATION

2020上海法兰克福汽配展
Automechanika Shanghai

欢迎莅临泰案联展位
Welcome to visit TecAlliance

展会时间/Date: 12.02-05 展位信息/Booth No.: 2.1 E70

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+86 21 3387 0258
sale_cn@tecalliance.net
www.tecalliance.cn

中国·国家会展中心(上海)
地址: 上海市崧泽大道333号



Company News

2020 TecAlliance Award Ceremony

2020 TecAlliance Award Ceremony will take place on Dec, 2nd at the booth during Automechanika Shanghai.

During this event, 13 companies will be awarded for 6 awards:

- Most Updated Data Award
- Best Coverage Award
- Best Integrity Award
- Best Data Quality Award
- Best Coverage for New Vehicle
- Most Popular Award

Who are going to win? Welcome to join us.
Looking forward to your attendance!



Company News

TecAlliance&Casstime enhanced the Strategic partnership

TecAlliance established the partnership with Casstime since January 2019, providing professional data services for Casstime's part business. providing professional data services for Casstime's part business.

The two parties showed great interests to further enhance the co-operation for data service and hope to make contributions for digitalizing China automotive aftermarket.





TecAlliance

THANK YOU!

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