

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

Description: 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)

Contents:	1. Energy Policy
	1.1. Energy Consumption Status (2004~2011)
	1.1.1. Energy Consumption Status
	1.1.2. Oil Price History
	1.1.3. Electricity Price History
	1.2. Nation Energy Plan
	1.2.1. Energy Demand Outlook (~2050)
	1.2.2. Nation Energy Plan
	1.3. Nation Renewable Energy Plan
	2. China's 7 New Strategic Industries
	2.1. New Energy
	2.2. New Energy Vehicle
	2.3. New Materials
	2.4. Next Generation IT
	2.5. Energy Saving & Environment Protection
	2.6. Biotechnology
	2.7. High-Tech Equipment Manufacturing
	3. Fuel Economy Regulation (Mileage) for Vehicle
	3.1. EU's ECE Mode
	3.2. Fuel economy regulation (Mileage) in China
	3.2.1. GB 19578-2004 & GB 27999-2011 ""Passenger car fuel consumption limits""
	3.2.2. GB 20997-2007 ""Light commercial vehicle fuel consumption limit""
	3.2.3. Fuel Economy and GHG(Greenhouse Gases) Emissions Standards Around the World
	3.3. Excise Tax Rates for Light Duty Passenger Vehicles
	4. Emission Gas Regulation for Vehicle
	4.1. Background
	4.2. Regulated Engines and Vehicles in China
	4.2.1. Cars and Light Trucks
	4.2.2. Heavy-Duty Truck and Bus Engines
	4.2.3. Nonroad (Off-Road) Diesel Engines
	5. Government Policy History for EVs Development in China
	5.1. Chinese Vehicle Industry Development Status
	5.2. Government Policy History for EVs Development
	5.2.1. Overview
	5.2.2. Stage 1 : 1999~2002 ""Clean Vehicle Action"" the government invested 100million RMB
	5.2.3. Stage 2 : from 2002 ""Major EV project"" the government invested 880million RMB
	5.2.4. Stage 3 : from 2006 ""Energy saving and new energy Vehicles major project"" the government invested 11million RMB
	5.2.5. Stage 4 : ""Ten Cities, Thousand Vehicles"" Demonstration Project
	5.2.6. 12th Five-Year Plan for 'Development of New Energy Vehicles Industry(2011-2020)5.2.7. Revised Plan : ""Energy-saving and New Energy Automobile Industry Development Plan (2012-2020)""
	5.2.7.1. Development Status and Situation Confronted
	5.2.7.2. Guiding Ideology and Fundamental Principles
	5.2.7.3. Technical Route and Major Objectives
	5.2.7.4. Main Tasks
	5.2.7.5. Guarantee Measures
	5.2.7.6. Plan Implementation
	6. Pilot Projects for New Energy Vehicle
	6.1. Electric Vehicle Demonstration Complex in China City
	6.1.1. Overview
	6.1.2. Promotion and application of energy-saving and new energy vehicle demonstration project recommended models directory (36th batch)
	6.1.3. 12 Pilot Cities Profiling for Electric Vehicle Demonstration complex
	6.1.3.1. Beijing
	6.1.3.2. Changchun
	6.1.3.3. Chengdu
	6.1.3.4. Chongqing
	6.1.3.5. Guangzhou

- 6.1.3.6. Hangzhou
- 6.1.3.7. Hefei
- 6.1.3.8. Shanghai
- 6.1.3.9. Shenzhen
- 6.1.3.10. Suzhou
- 6.1.3.11. Tianjin
- 6.1.3.12. Wuhan
- 6.1.4. Promotion status and planning of New energy vehicle pilot cities
- 6.2. EV/Battery Rental Project
- 6.3. Other Pilot Projects for New Energy Vehicle

- 7. Government Support Program for EV
 - 7.1. Financial Program
 - 7.1.1. Subsidy
 - 7.1.2. Tax credit
 - 7.2. R&D Policy
 - 7.2.1. Technical Development Route
 - 7.2.2. Key components technology breakthrough in ""Three latitudes""
 - 7.2.3. Integrated technology innovation in ""three longitudes""
 - 7.2.4. ""Three platforms"" public technology and application development

- 8. EV Makers' Development Trends
 - 8.1. BAIC
 - 8.2. Chery
 - 8.3. CCAG
 - 8.4. Dongfeng Motor Corp
 - 8.5. GAC
 - 8.6. SAIC
 - 8.7. FAW
 - 8.8. BYD
 - 8.9. Geely

- 9. EV Battery Makers' Development Trends
 - 9.1. BYD
 - 9.2. CITIC GUOAN Mengguli(MGL)
 - 9.3. China BAK Battery
 - 9.4. Wanxiang EV
 - 9.5. Tianjin EV Energies
 - 9.6. Tianjin Lishen Battery

- 10. EV Motor Makers' Development Trends
 - 10.1. Zhongshan Broad-Ocean Motor Co. Ltd.
 - 10.2. Zhejiang Founder Motor Co. Ltd.
 - 10.3. Shanghai Edrive Co., Ltd.
 - 10.4. Shanghai Dajun Technology, Inc.
 - 10.5. Jiangxi Special Electric Motor Co., Ltd.

- 11. EV BMS Makers' Development Trends
 - 11.1. Huizhou Epower Electronic Co.,LTD
 - 11.2. Tianjin Qingyuan Electric Vehicle Co.,LTD
 - 11.3. Shenzhen Battsister Co. Ltd
 - 11.4. Harbin GuanTuo power co., Ltd.
 - 11.5. Beijing Kenergy technology Co., Ltd.

- 12. Supply Chain Analysis for Major xEV Makers
 - 12.1. Component Supplier for Major xEV Makers
 - 12.2. EV Battery Supplier for China xEV Makers

- 13. Hybrid & Plug-in Hybrid & Pure Electric Vehicle Market Forecast in China (2009~2020)
 - 13.1. China Automobile Market Status and Forecast (2009 ~ 2020)
 - 13.2. China xEV Market Status and Forecast (2009 ~ 2020)
 - 13.2.1. China xEV Market Status (2009 ~ 2011)
 - 13.2.1.1. Hybrid & Plug-in Hybrid & Pure Electric Vehicle Sales Result by Techonogy (2009 ~2011)

13.2.1.2. Hybrid & Plug-in Hybrid & Pure Electric Vehicle Sales Result by Maker and Model (2007 ~2011)

13.2.2. Hybrid & Plug-in Hybrid & Pure Electric Vehicle Market Forecast (2009 ~ 2020)

13.3. China xEV Battery Price Status and Forecast (2009 ~ 2020)

14. Index

14.1. Figure

14.2. Table

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