

TecAlliance E-newsletter

Heavy Commercial Vehicles and
New Energy Vehicles

Greater China

Version January & February 2024

01 Market Outlook

China Mainland
China Hong Kong
China Taiwan

02 TecAlliance Data

OES Data Overview

03 Company News

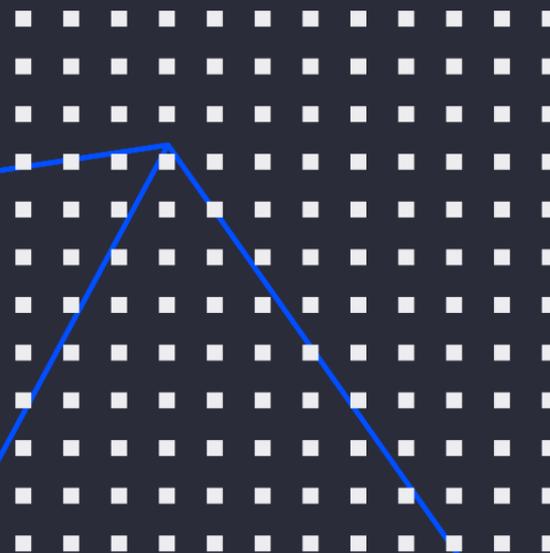
TecDoc 30 Years Anniversary



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



Chenglong H5 8x4 lightweight dump truck Compliance makes it easier to install



- In 2024, multiple provinces and regions including Guangdong, Guangxi, Fujian, Northeast China, and Inner Mongolia will launch special campaigns to rectify overloading and overloading. In addition to provincial road stations and high-speed inspections, they will also carry out source control for key freight scenarios such as mines, construction sites, and cement. This type of freight scenario is usually dominated by dump trucks, which means that in 2024, lightweight dump trucks will be more popular in the market, and the Chenglong H5 8x4 lightweight dump truck is born for this.
- The Chenglong H5 8x4 lightweight dump truck applies 20 lightweight technologies to optimize key components such as the driver's cab, chassis bridge, frame, and wheel hub, achieving weight reduction of the entire vehicle. The chassis weight can be as low as 8.1 tons, which is more than 200kg lighter than competitors. When the same standard load is 31 tons, this alone can increase the annual revenue by 8000 yuan.
- While being lightweight, the vehicle still maintains its super strong load-bearing performance. The inner and outer beams are tightly fitted to ensure the strong load-bearing capacity of the frame, without any worries of distortion, deformation, or fracture, earning the reputation of being the "backbone of the dragon". At the same time, according to the actual operating conditions of standard load transportation, the axle, frame, and suspension are newly matched, and the overall load-bearing capacity of the vehicle is increased by 10%.
- It is both capable of loading and reliable. The Chenglong H5 8x4 lightweight dump truck perfectly matches the transportation needs of sand, asphalt, coal, cement, and other materials, making it an excellent choice for engineering transportation today.

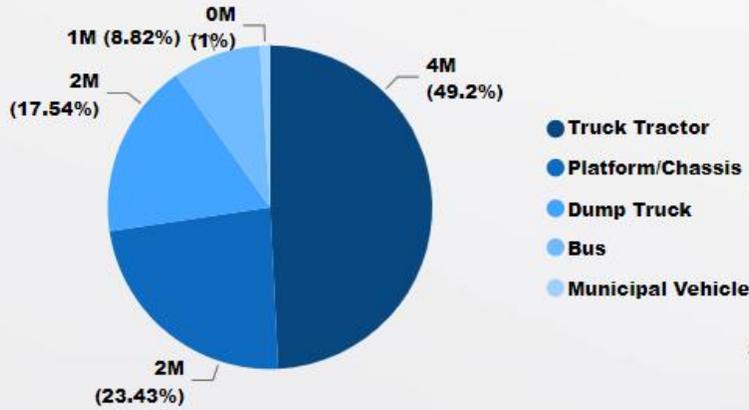
China CV VIO Report

TecAlliance CHINA CV VIO REPORT

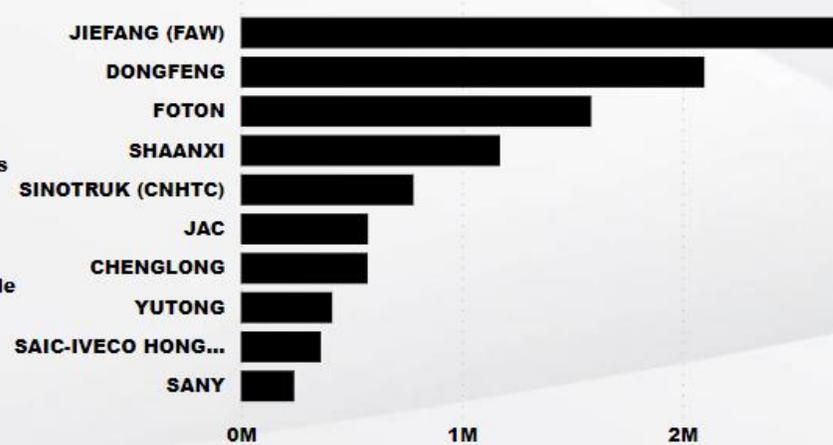
VIO until 2023H1
Data based on ChinaID level data

VEHICLE IN OPERATION: 13M **VEHICLES BRANDS: 159** **N-TYPE W/ VIO: 6683** **CHINAID W/ VIO: 88514**

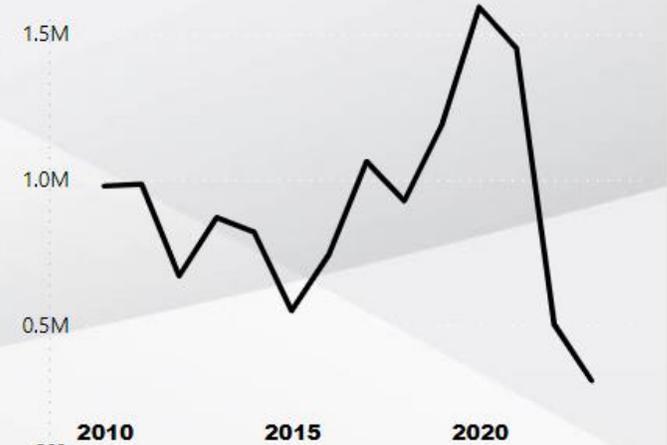
VIO By Body type



Top 10 BRANDS by VIO



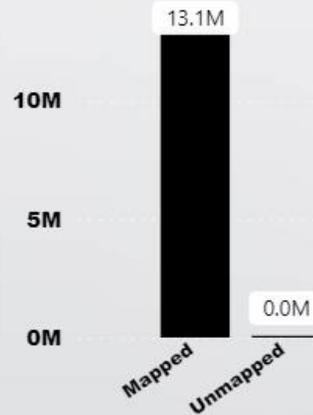
REGISTRATION TREND by YEAR



TOP 5 PROVINCE by VIO



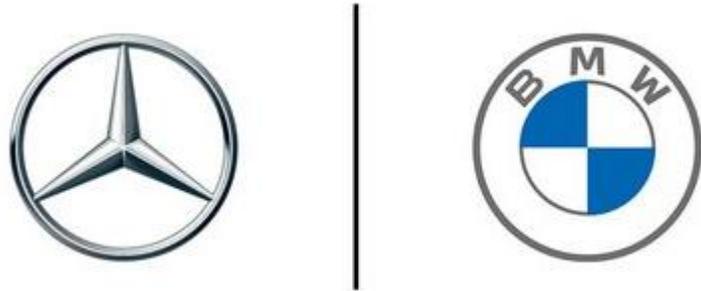
N-TYPE/VIO COVERAGE



TOP 3 VEHICLE IN OPERATION

1		2		3	
	JIEFANG (FAW) J6P		DONGFENG TIANLONG		FOTON AUMAN ETX
	MODEL		MODEL		MODEL
	1,091,616		724,302		607,121
	POPULATION		POPULATION		POPULATION
	8.27%		5.48%		4.60%
	SHARE		SHARE		SHARE

The European Commission approves the establishment of a joint venture between Mercedes Benz and BMW



- The European Commission has announced that, in accordance with the EU merger regulations, it has approved the establishment of a joint venture between Mercedes Benz (China) Investment Co., Ltd. and BMW Brilliance Automotive Co., Ltd. This transaction mainly involves the Chinese battery powered vehicle public charging infrastructure network market.
- The European Commission stated that given the limited impact on the European Economic Area, the related transactions will not raise competition issues. The transaction was reviewed according to a simplified merger review procedure.
- On November 30, 2023, Mercedes Benz (China) Investment Co., Ltd. and Brilliance BMW Automotive Co., Ltd. announced the signing of a cooperation agreement. The two parties will establish a joint venture in China with a 50:50 shareholding ratio to operate a super charging network in the Chinese market and work together to meet the growing demand for luxury charging services from Chinese customers.
- By the end of 2026, the joint venture company plans to build at least 1000 advanced technology super charging stations and approximately 7000 super charging piles in China. The first batch of charging stations are planned to start operating in key new energy vehicle cities in China starting from 2024, and subsequent charging station construction will also cover other cities and regions across the country.
- The charging network of the joint venture company will be open to the public. According to the plan, customers of Mercedes Benz and BMW groups can enjoy exclusive and exclusive services, such as seamless digital charging experiences such as plug and play charging and online booking

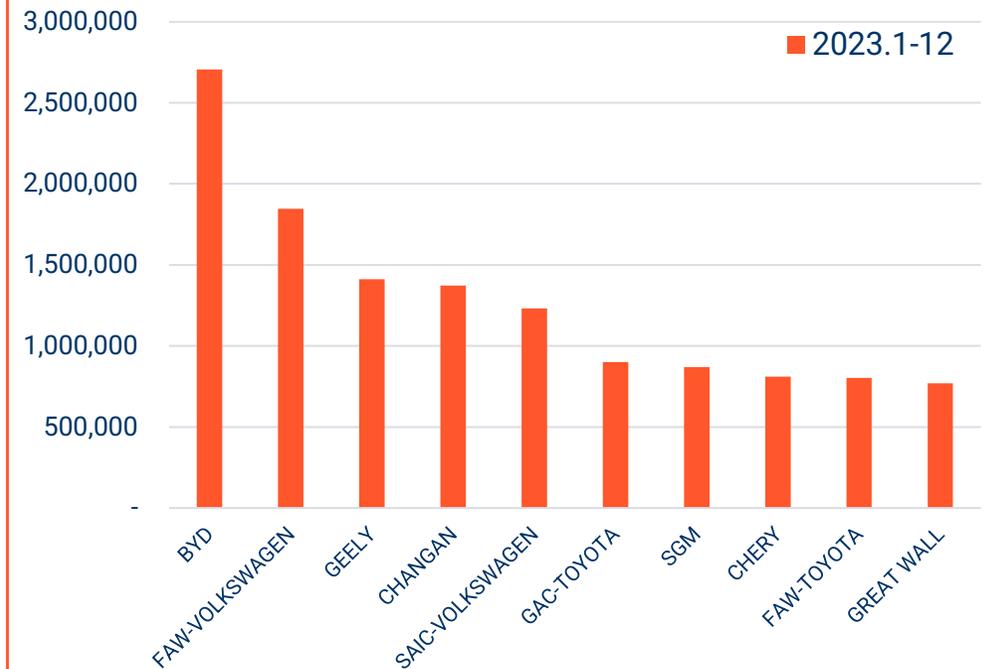
China Mainland Highlight Vehicle News

Top 10 NEV Manufacturer sales rankings in May 2023



■ Sales comparison

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

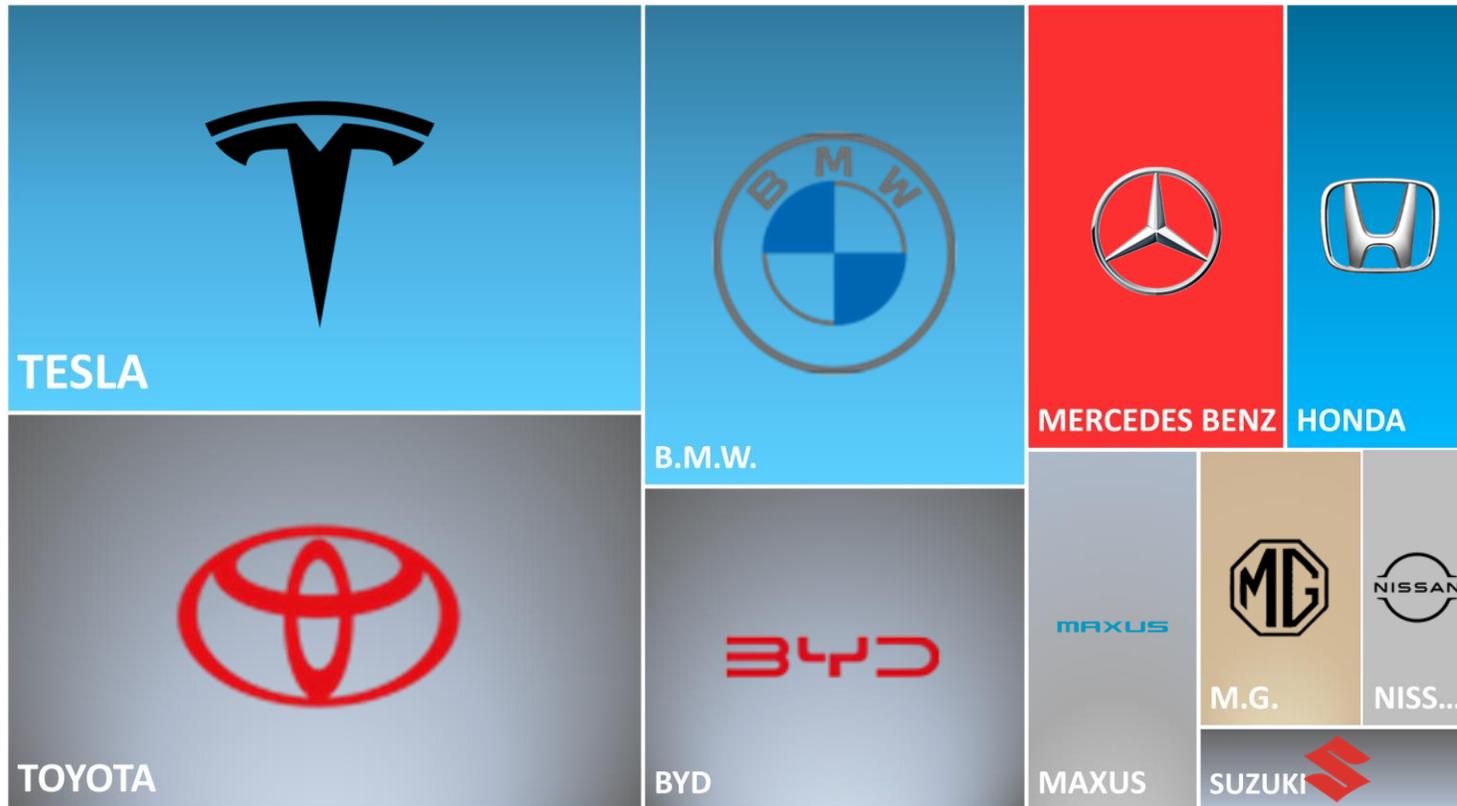


Hong Kong Highlight Vehicle News

Hong Kong October 2023 Vehicle News

Hong Kong passenger car sales were 3,727 units in October 2023 and 4,403 units in October 2022, down 15.4% year-on-year. TESLA sold 715 units, down 3.8% month-on-month, and continued to be the most popular car brand in Hong Kong.

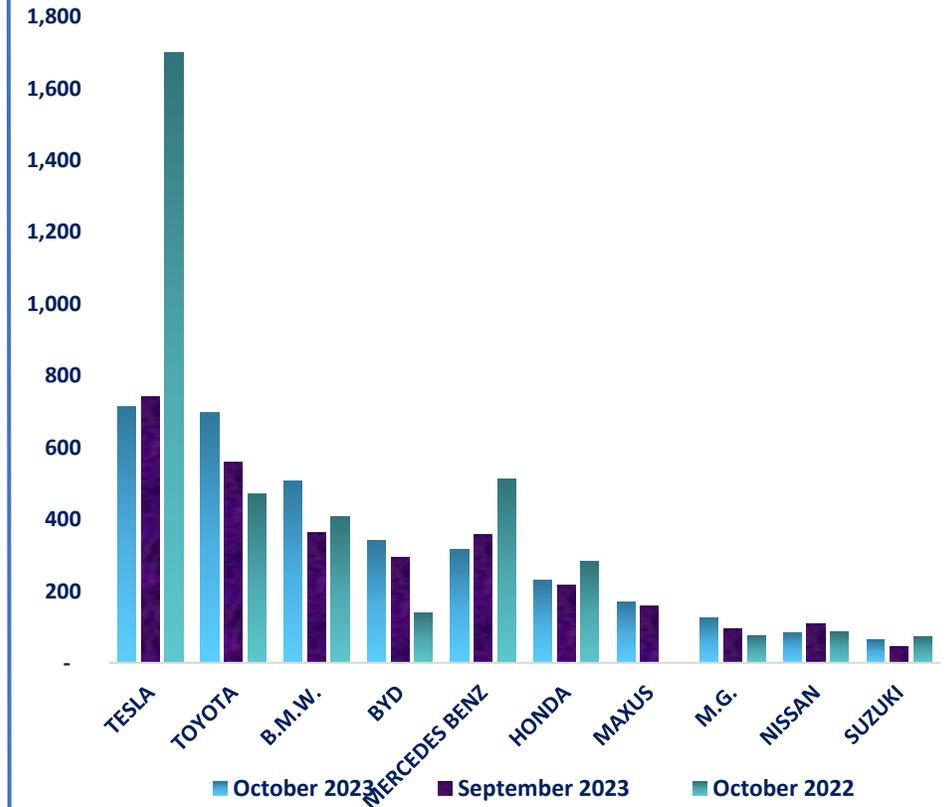
Toyota came in second with 697 units sold, up 24.5% month-on-month. BMW rose 39.9% month-on-month to rank third. BYD's sales rose 16.7% month-on-month, ranking fourth. Mercedes-Benz ranked fifth with 317 units sold, down 11.5% month-on-month. Among the remaining top 10 brands, except for Nissan, which is in decline, the rest of the sales have shown varying degrees of growth. Overall, the sales volume of the entire automobile market showed a stable trend.



Hong Kong Sales Comparison

Total vehicle sales were generally stable

In October, TESLA went on to be the most popular car manufacturer in Hong Kong. Toyota's sales increased month-on-month, ranking second. BMW's sales increased month-on-month, ranking third. BYD's sales showed an upward trend, ranking fourth. Mercedes-Benz sales fell month-on-month, ranking fifth. Finally, Honda, MAXUS, M.G., Nissan, and Suzuki are in the bottom five.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for December 2023

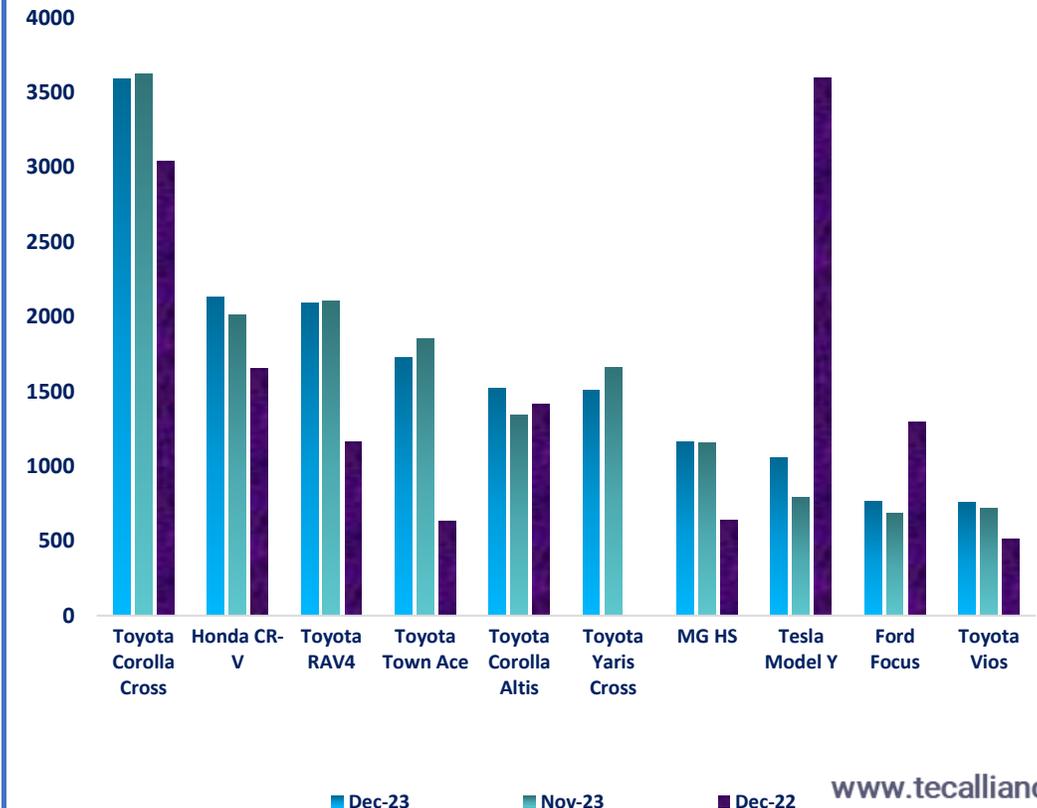


Under the splendid New Year's Eve fireworks, the world officially bids farewell to 2023 and welcomes the new year 2024. In December 2023, the final sprint of 2023, the total market delivered 43,161 units close to November, and the cumulative sales volume for the whole year successfully crossed the 475,000 mark, and finally closed with 476,987 units, an increase of 11% compared with 2022, an increase of more than 1%. In 2023, there will be a large number of deliveries. However, if we carefully compare the composition of annual sales data, the cumulative sales volume in the first half of 2023 will be 234,857 units, and the second half of the year will only increase slightly to 242,130 units, accounting for 49.3%:50.8% of sales in the first half of the year, and the proportion of sales will be slightly more than that in the second half of the previous year. Obviously different, showing that after a large number of car deliveries in the total market in the first half of the year, with the gradual reduction of undelivered orders from some car manufacturers, and the habit of some consumers to place orders and wait for cars from multiple brands during the epidemic, car manufacturers still have a considerable degree of water content in the number of orders, resulting in fierce sales competition in the second half of the year, and the overall number of licenses failed to continue the substantial growth in the first half of the year.

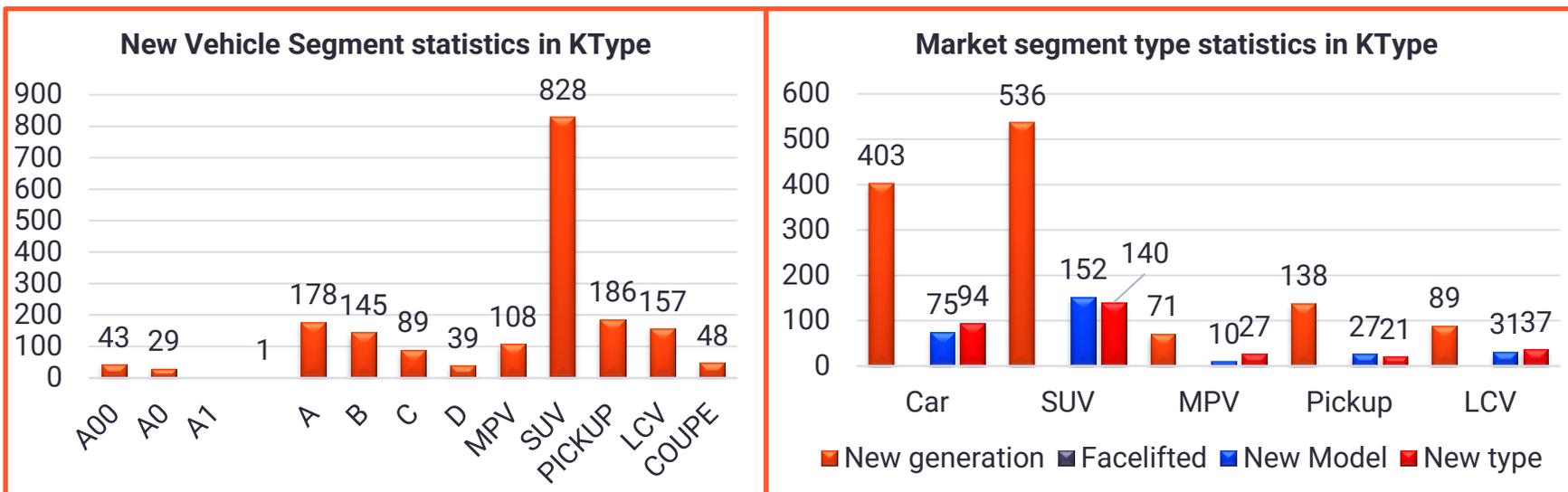
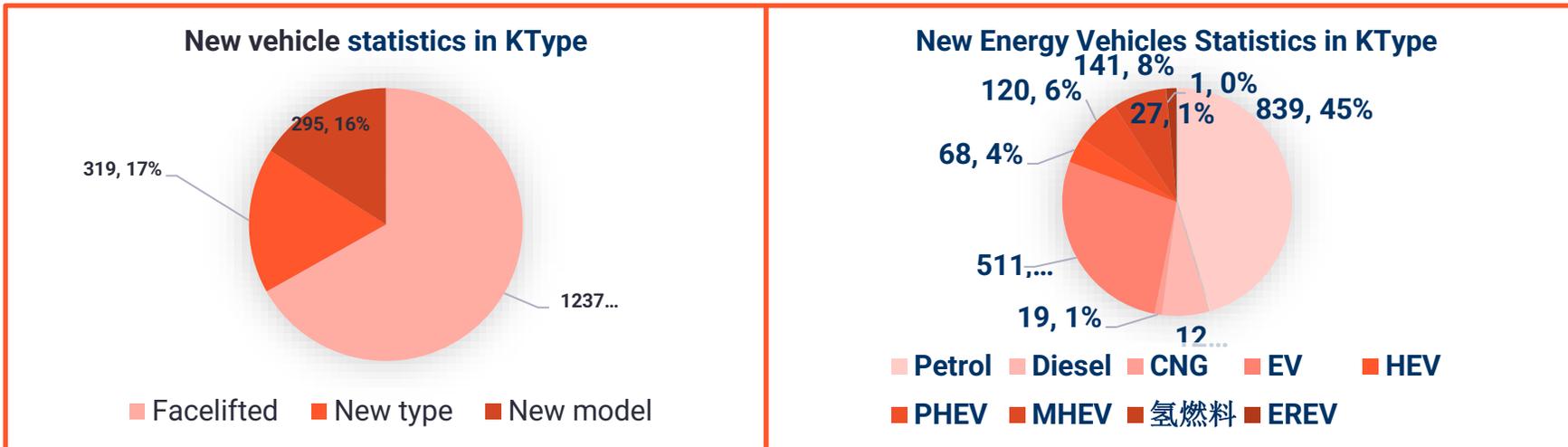
Taiwan Sale Comparison

The overall market sales performance in December was solid

The top 10 automakers in the total market continued to increase their sales compared to November. The December sales champion went on to be won by Taiwanese supernova Toyota Corolla Cross with 3,587 units. The Honda CR-V came in second place with 2,133 units, up 5.9% month-on-month. The Toyota RAV4 came in third with 2,092 units, down 0.5% m/m and up 800% y/y. The Toyota Town Ace was in fourth place with 1,723 units. The Toyota Corolla Altis was in fifth place with 1,723 units sold, and the Toyota Yaris Cross was sixth with 1,509 units sold. Finally, MG HS, Tesla Model Y, Ford Focus, and Toyota Vios ranked seventh, eighth, ninth, and tenth with 1,160, 1,054, 762, and 758 units, respectively.



China Jan - Dec New Energy Vehicles Analysis



Remarks:

All statistical data is based on K-Type. From **January to December 2023**, the total coverage of **K-Type** was **1851**, of which **614** 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 New Energy Vehicles Analysis

#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total
1	MERCEDES-BENZ	71	31	HONDA (GAC)	20	61	NETA (HOZON) (5156)	11	91	MAPLE (5696)	5	121	KIA	3	151	REFINE	1
2	CHERY	55	32	GEELY	20	62	HYPER (6929)	11	92	VENUCIA	5	122	HYCAN	3	152	MG (75)	1
3	MAXUS	55	33	AEOLUS	19	63	TESLA (3328)	11	93	DENZA	4	123	LINGBOX	3	153	JENHOO-AUTO (7096)	1
4	AUDI (FAW)	51	34	LAND ROVER	18	64	GALAXY (6856)	9	94	NETA (HOZON) (5156)	4	124	RCEV	3	154	(6543)	1
5	VW (SVW)	47	35	VOLVO ASIA	18	65	(5259)	9	95	JAGUAR	4	125	JIANGNAN	3	155	HIPHI (5858)	1
6	(BBDC)	46	36	HONGQI	17	66	IM MOTORS (6514)	9	96	PEUGEOT (DF-PSA)	4	126	SMART	3	156	VICTORY	1
7	BYD	41	37	LEXUS	17	67	LIVAN AUTO (6739)	9	97	KARRY	4	127	JAC EV (6903)	3	157	EV HOUSE	1
8	AUDI	39	38	SKYWORTH	16	68	IM MOTORS (6514)	8	98	CITROËN (DF-PSA)	4	128	MODERN AUTO (6378)	3	158	HIPHI (5858)	1
9	CHANGAN	38	39	FOTON	16	69	VGX (5506)	8	99	ALFA ROMEO	4	129	M-HERO (7029)	3	159	LAMBORGHINI	1
10	VW (FAW)	34	40	SKODA (SVW)	16	70	JAC EV (6903)	8	100	BAIC-ORV	4	130	SMART (1138)	2	160	LINXYS (6928)	1
11	AUTO)	33	41	ARCFOX	15	71	MODERN AUTO (6378)	7	101	NIO	4	131	VIAUTO (6768)	2	161	SAMSUNG	1
12	JETOUR	31	42	PORSCHE	15	72	M-HERO (7029)	7	102	INFINITI (DFAC)	4	132	MODERN AUTO (6378)	2	162	REACH (7095)	1
13	GREAT WALL	31	43	NETA (HOZON)	15	73	SMART (1138)	7	103	TANK	4	133	M-HERO (7029)	2	163	FORD	1
14	SRM (BRILLIANCE)	30	44	FORD (CHANGAN)	14	74	VIAUTO (6768)	7	104	HYPER (6929)	4	134	SMART (1138)	2	164	DS (CAPSA)	1
15	WULING (SGMW)	30	45	GAC NE	14	75	RADAR (6710)	7	105	TESLA (3328)	4	135	VIAUTO (6768)	2	165	BEIJING (5670)	1
16	FENGXING	30	46	BMW (BRILLIANCE)	14	76	LANDIAN (7577)	7	106	GALAXY (6856)	4	136	RADAR (6710)	2	166	POLESTONES (7023)	1
17	BMW	30	47	NISSAN (DFAC)	14	77	JIYUE AUTO (7090)	7	107	HYUNDAI (BEIJING)	4	137	LANDIAN (7577)	2	167	MAPLE (5696)	1
18	TOYOTA (GAC)	29	48	MG (SAIC)	14	78	LUXEED (7731)	7	108	(5259)	4	138	LANDIAN (7577)	2	168	LINCOLN	1
19	TOYOTA (FAW)	27	49	CHEVROLET (SGM)	13	79	(6624)	7	109	JETTA	4	139	LUXEED (7731)	2	169	WULING	1
20	JAC	25	50	HONDA (DONGFENG)	13	80	(7507)	7	110	WEY	4	140	FORD USA	2	170	MAPLE (5696)	1
21	JMC	25	51	BENTLEY	13	81	YANGWANG (7089)	7	111	IM MOTORS (6514)	4	141	JIYUE AUTO (7090)	2			
22	CHANA	23	52	GAC	13	82	MG (75)	6	112	LIVAN AUTO (6739)	3	142	LUXEED (7731)	2			
23	HAVAL	23	53	LYNK & CO	12	83	JENHOO-AUTO (7096)	6	113	IM MOTORS (6514)	3	143	(6624)	2			
24	JINBEI	23	54	AUDI (SAIC) (6400)	12	84	(6543)	6	114	VGX (5506)	3	144	HAIMA (FAW)	2			
25	FORD (JMC)	22	55	DEEPAL (6587)	12	85	NEOMOR (7098)	6	115	VW	3	145	NEW BAOJUN	2			
26	DONGFENG (DFAC)	22	56	AITO (6465)	12	86	HIPHI (5858)	6	116	LIXIANG	3	146	(6624)	1			
27	BUICK (SGM)	21	57	GENESIS (4473)	12	87	LINXYS (6928)	5	117	MAPLE	3	147	CIIMO	1			
28	BAW	21	58	R AUTO (6067)	12	88	REACH (7095)	5	118	FENGON	3	148	DS	1			
29	ISUZU (JIANGXI)	21	59	QIYUAN (7094)	12	89	BEIJING (5670)	5	119	JEEP	3	149	(7507)	1			
30	EXEED (CHERY)	21	60	AVATR (6622)	11	90	POLESTONES (7023)	5	120	GENESIS	3	150	YANGWANG (7089)	1			

Remarks:
All statistical data is based on K-Type. **From January to December 2023**, the total coverage of K-Type was **1851**, of which **614** were **New K-Type**.

China VIO Report

CHINA VIO REPORT

VIO until 2023H1

China Mainland

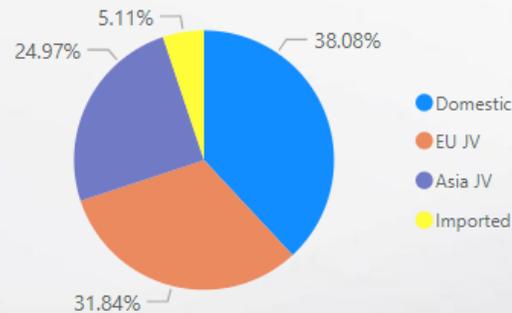


VEHICLES IN OPERATION	VIO WITH KTYPE	KTYPE WITH VIO	VEHICLE BRANDS
291,987,409	291,968,189	9231	320

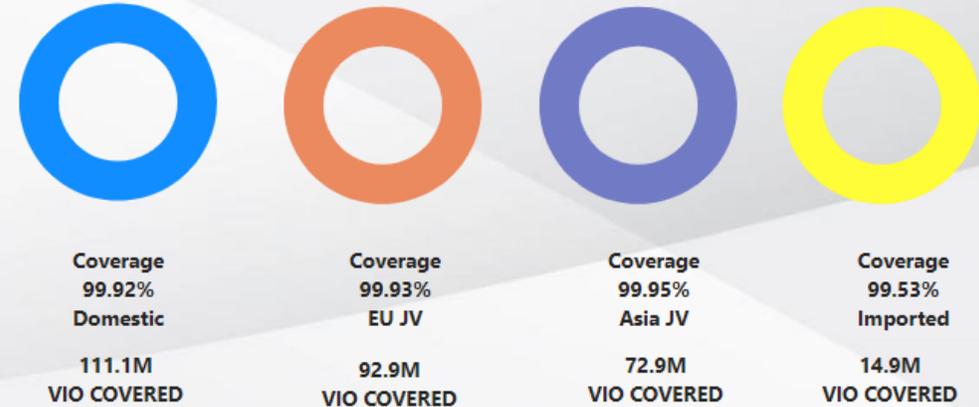
INFORMATION

- DOMESTIC & ASIA JOINT VENTURE CAR**
INCLUDES BRAND WHICH ARE PRODUCED IN CHINA SUCH AS BYD, GEELY, CHERY&ETC
- EU JOINT VENTURE CAR**
INCLUDES ASIAN JV BRAND WHICH ARE PRODUCED IN CHINA SUCH AS TOYOTA(FAW),HONDA(GAC)&ETC
- IMPORTED 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



K-TYPE / VIO COVERAGE BY SEGMENT



TOP1 VEHICLE BASED ON VIO



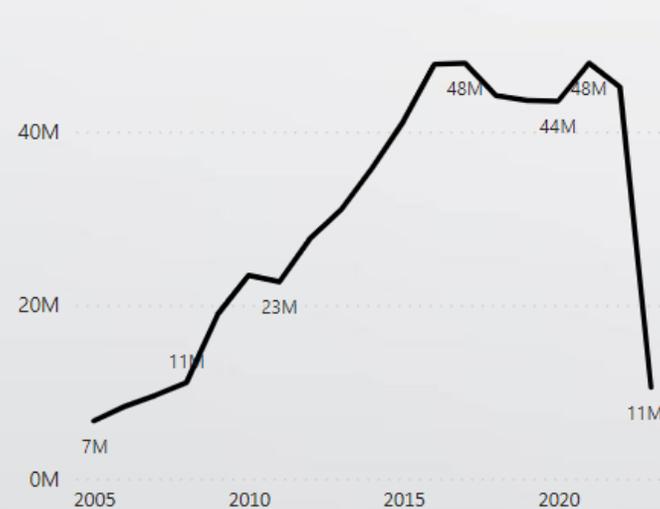
VW (SVW)

LAVIDA

VIO OF TOP 1 VEHICLE
1,842,868

POPULATION SHARE
0.65%

TREND OF REGISTRATION FROM 2005 TO 2023H1(Overall PC)



TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2023H1)

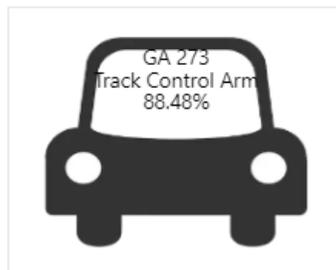
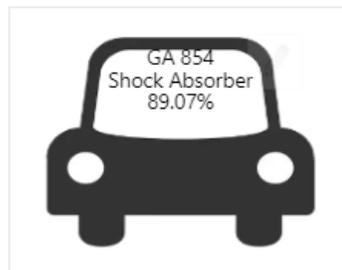


02

TecAlliance Data OES Data Overview



OE Coverage by VIO



VIO Coverage base on 2022H2
Nov-2023 Update

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
854	Shock Absorber	89.07%
273	Track Control Arm	88.48%
447	Compressors	87.48%
424	Interior air Filter	86.48%
298	Wiper Blade	86.29%
448	Condenser	81.61%
402	Pad (disc brake)	81.37%
82	Disc	80.02%
654	Wheel Bearing Kit	80.00%
508	Radiator Fan Complete	77.07%
1	Starter Battery	76.66%
793	Electric Motor Blower	76.64%
78	Caliper cylinder (housing)	76.18%
83	Brake hose	75.69%
3229	Link,(Rod/Strut) stabilizer	74.53%
471	Evaporators	66.41%
467	Heat Exchanger, interior heating	66.00%
219	Gas spring boot-/cargo area	65.05%
1351	Additional Water Pump	64.32%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
1180	Suspension Strut Support Mounting	64.15%
1561	Regulator,window	61.14%
1182	Rubber Buffer, suspension	57.43%
3365	Cover/Rubber Boot, shock absorber	56.39%
397	Expansion Tank, coolant	55.15%
183	Expansion Valve, air conditioning	54.31%
1626	Friction Bearing	53.32%
914	Tie Rod End	53.12%
5031	Radiator, Drive Battery	51.49%
2232	Wheel Sensor,tyre pressure control system	49.10%
13	Drive Shaft	42.52%
200	Electro Motor, window regulator	35.39%
331	Bushing, stabilizer	32.69%
2462	Ball Joint,(Support-/Controlarm Link)	30.09%
51	Axial Joint (steering)	29.85%
514	Gas spring engine flap	24.21%
191	Bellows (steering)	24.13%
5314	Screw Set, brake disc	22.65%

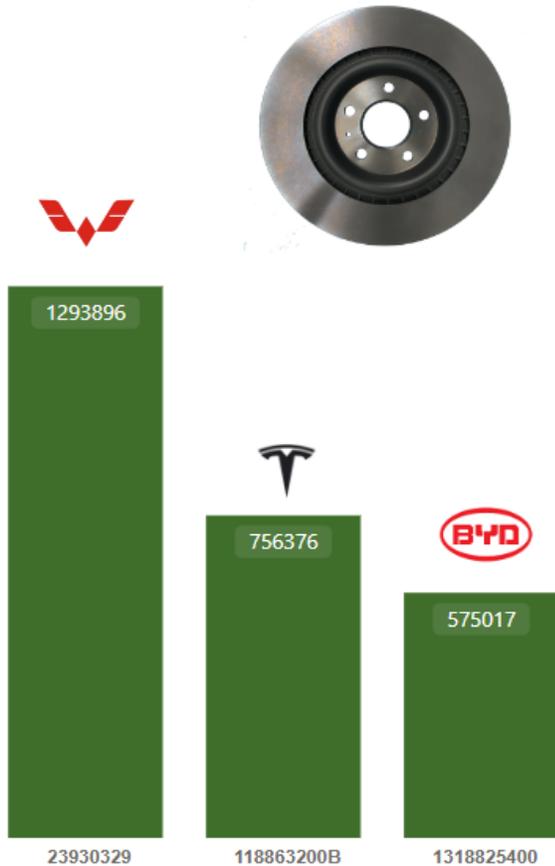
NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
301	Wiper Arm,windscreen washer	22.28%
123	Drum	22.25%
70	Shoe (drum brake)	21.09%
251	Control Arm-/Trailing Arm Bush	20.44%
655	Wheel Bearing	20.27%
851	Receiver Driers	19.34%
124	Primary handbrake cable	18.84%
919	Dust Cover Kit, shock absorber	15.52%
299	Wiper Blade Rubber	11.81%
2323	Radiator Fan Shroud	10.86%
300	Wiper Linkage	10.47%
195	Bellow Kit (steering)	8.48%
8558	Battery Pack/48 V Battery	5.01%
788	Electric Motor, sunroof	4.69%
4118	Air Spring Strut	4.20%
60172	Charger, Traction battery	3.16%
2229	Valve, tyre pressure control system	2.47%
792	Radiator Fan Motor	2.47%
407	Warning Contact, brake pad wear	2.46%

Top 3 Coverage of OE

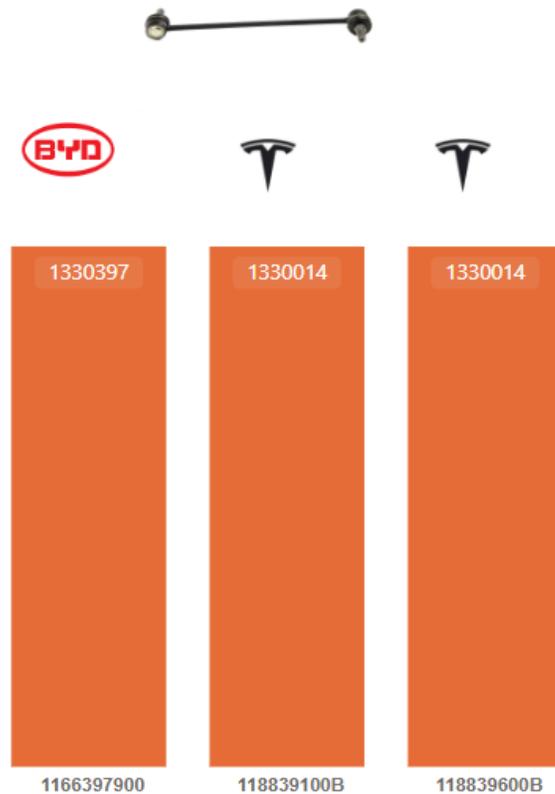
TACN PADS NEV DASHBOARD

VIO Coverage Of OE base on 2022H2 | Nov-2023 Update

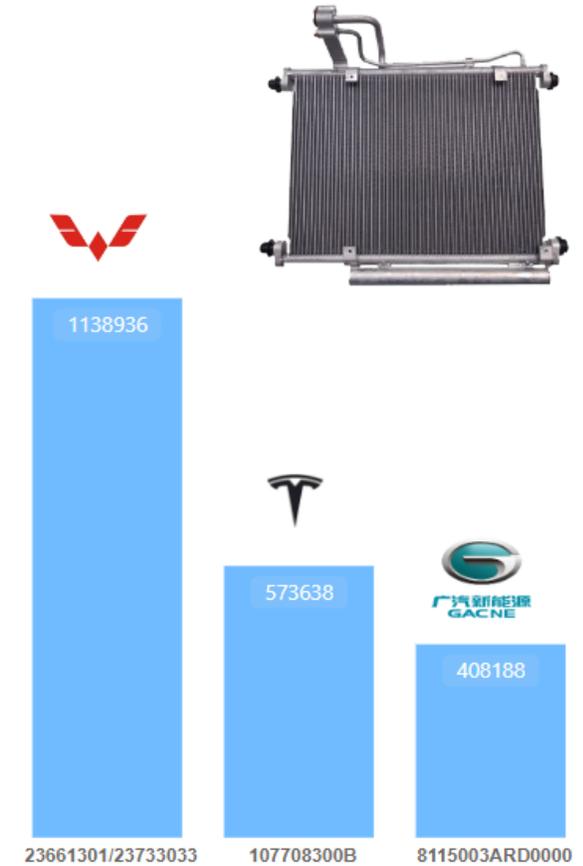
Top 3 Coverage of OE By VIO| GA 82 Brake Disc



Top 3 Coverage of OE By VIO| GA 3229 Link/Coupling Rod



Top 3 Coverage of OE By VIO| GA 448 Condenser



PADS NEV Dashboard

**K-TYPES Researched
YTD 2023**

576

**OE NOs Researched
YTD 2023**

17,165

**GA Researched YTD
2023**

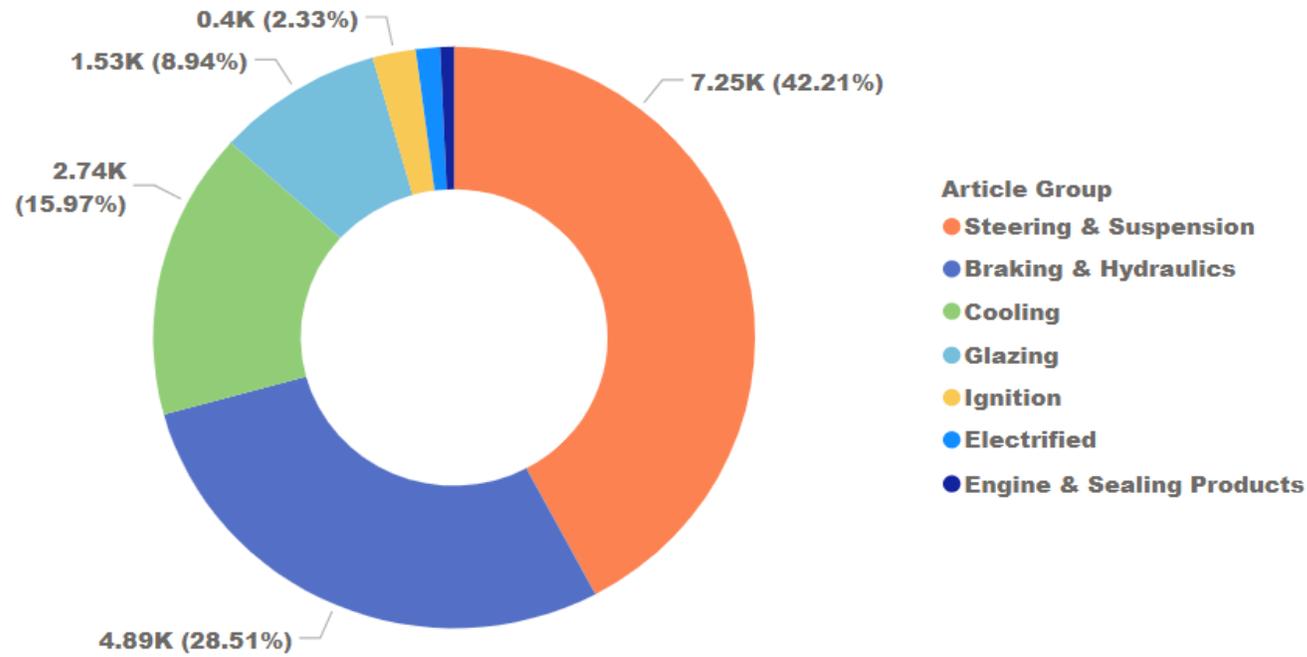
100

**Vehicle Brands Covered
YTD 2023**

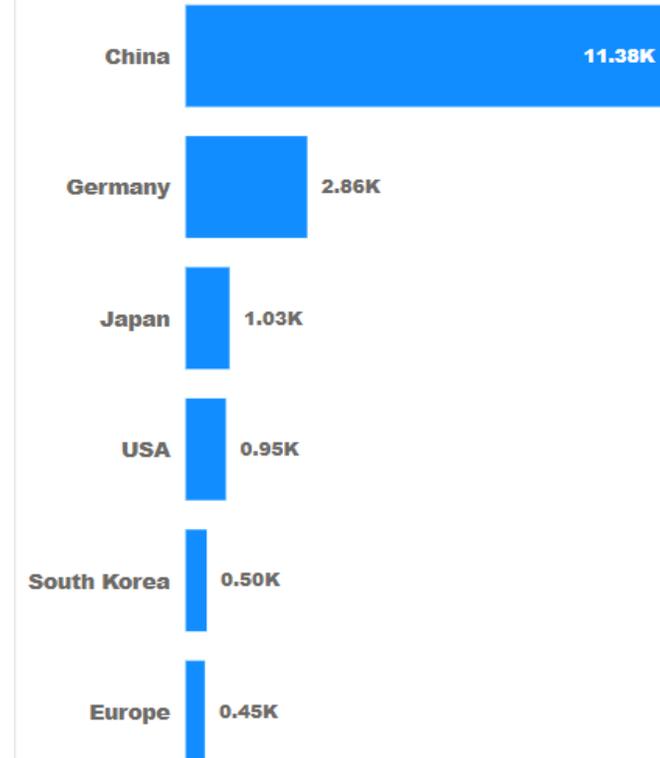
104

**KTYPES & OE Number for NEV
Nov-2023 Update**

Total Group by Number of OE



Total Brand Series by Number of OE



03

Company News TecDoc 30 Years Anniversary



TecDoc 30 Years Anniversary Celebration

TecAlliance China is celebrating **30** years of TecDoc



TecAlliance China celebrates 30 years of TecDoc Standard in Shanghai office. This data standard was introduced in 1994 so as to create a uniform data format for collecting, publishing and distributing high-quality spare parts information. The TecDoc Standard makes it possible to identify spare parts and vehicles quickly and accurately; and enables optimized automated and digitalized process solutions throughout the entire the Automotive Aftermarket (AM) supply chain.



Contact Us

Part Manufacturers & Brand Owners China-Mainland



Vivi Liu

Haiying.Liu@tecalliance.net

Tel: +86 182 2149 5081



Brian Sun

Xiaofeng.sun@tecalliance.net

Tel: +86 136 6157 1331



Ethan Xue

Jingyu.xue@tecalliance.net

Tel: +86 151 514 14273



Tonny Liu

Jia.liu@tecalliance.net

Tel: +86 135 640 08126



Ryan Zheng

Yunze.zheng@tecalliance.net

Tel: +86 138 457 79815

KAM (Key Account Management) E-commerce



Joe Jia

Chunhui.Jia@tecalliance.net

Tel: +86 173 7264 2905

Data User



Franky Zhou

Qi.Zhou@tecalliance.net

Tel: +86 135 2479 6845

Account Management Taiwan (China)



Calinda Zhang

Junfang.Zhang@tecalliance.net

Tel: +886 903576846

Global Web Catalogue



Ziying Ai

Ziying.Ai@tecalliance.net

China Marketing Communication

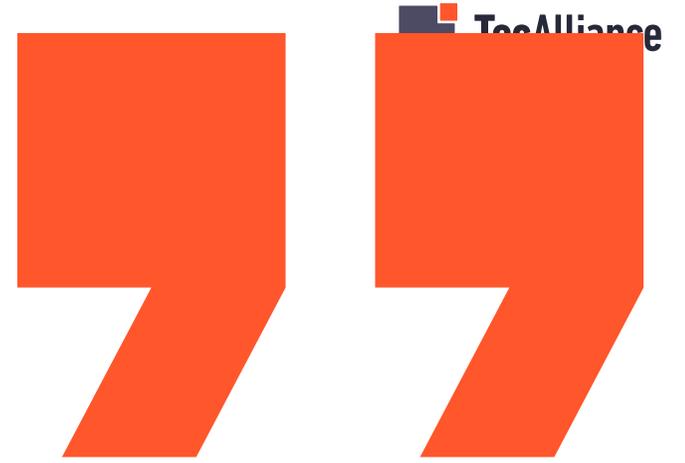


Jackie Pang

Jie.pang@tecalliance.net

Tel: +86 173 1717 5912

THANK YOU!



TecAlliance China Ltd.

+86 21 3387 0258

sales_cn@tecalliance.net

www.tecalliance.cn



Room 1015, Floor 10, Block 1, No.1868, Gonghexin Road, Shanghai, China

www.tecalliance.cn