

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version November and December 2024

30 YEARS

TecDoc

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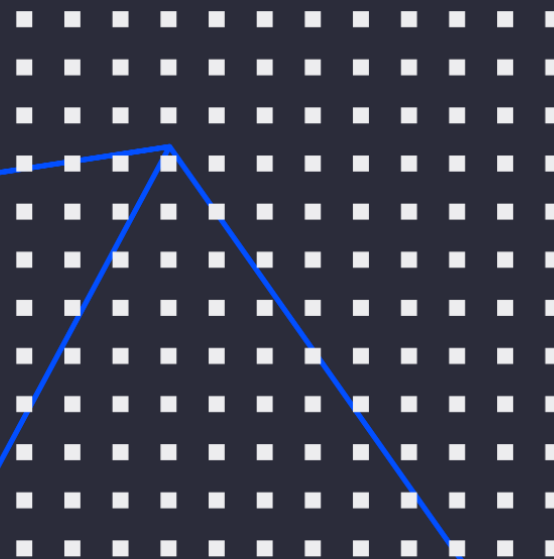
- TecAlliance China Customer Training Workshop – Shanghai
- Automechanika Shanghai 2024 Recap
- Happy Chinese New Year 2025!



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



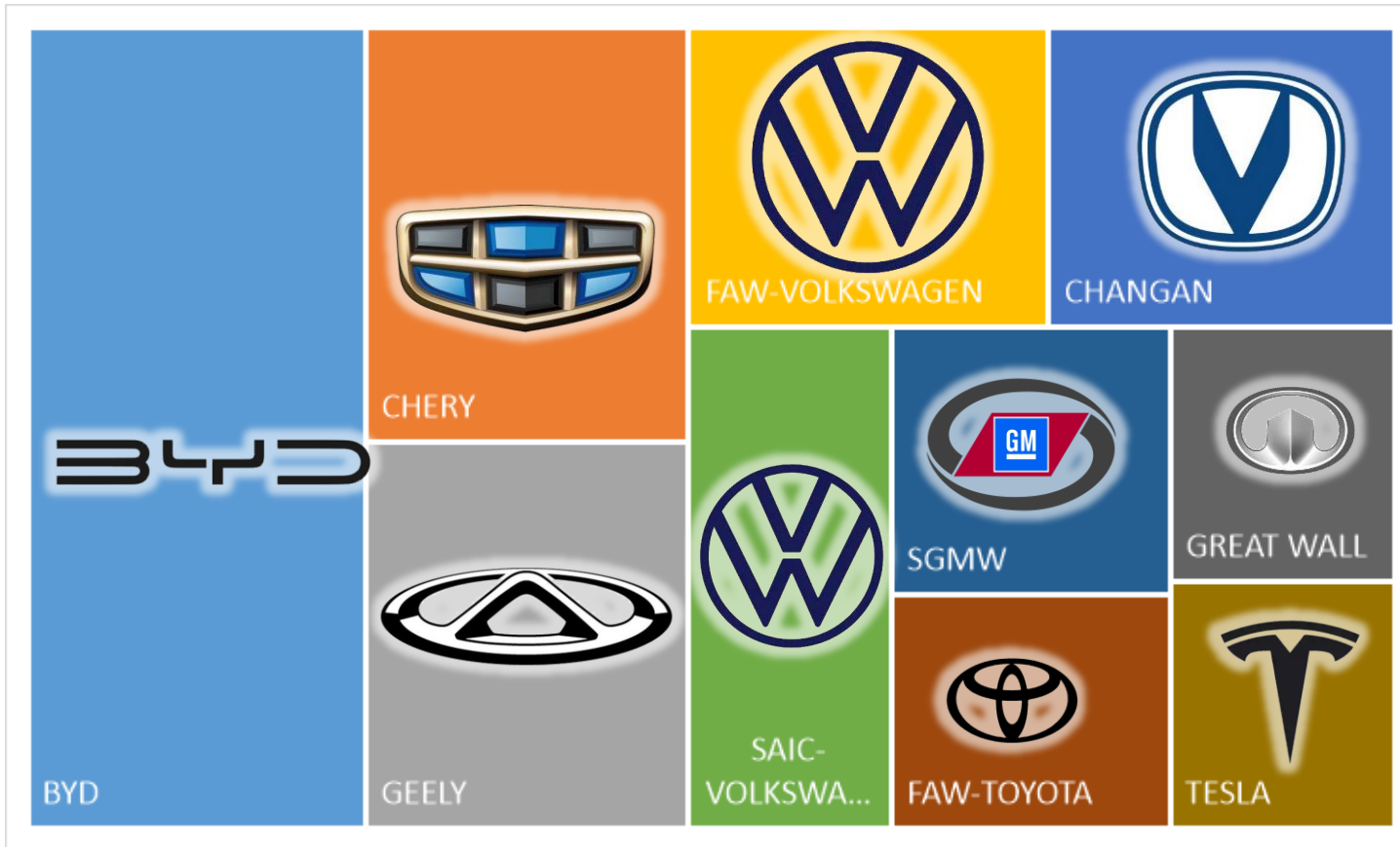
CATL: It is necessary to make battery swapping one of the mainstream methods



- Zeng Yuqun, Chairman and CEO of CATL, attended the Chocolate Battery Swap Ecology Conference and announced that CATL will soon launch a new generation of chocolate battery swap solutions, and will also work with ecological partners to launch the "Chocolate Battery Swap Ecology". He believes that electric vehicles face some special difficulties in actual use, and the battery swap mode can provide solutions. By 2030, battery swapping, home charging and public charging piles will be divided into three parts.
- CATL has become the global leader in power batteries for seven consecutive years, and has also ranked among the top ten automotive suppliers in the world in terms of revenue, changing the pattern of automotive suppliers in one fell swoop, but it does not mean that CATL has gained a firm foothold. The profit distribution of the industrial chain is in the hands of downstream car companies, and the cost is affected by the fluctuation of upstream lithium prices and other materials, and more competitors in the industry have joined, which may be the reasons why Ningde has entered the battery swap track.

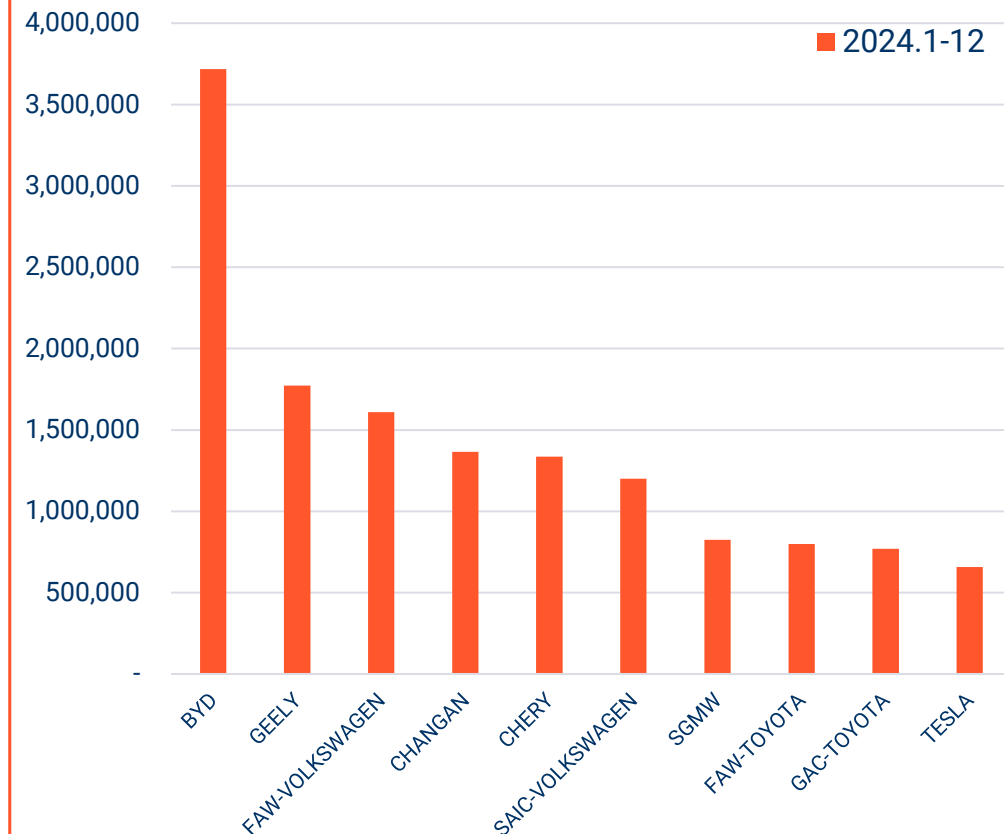
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in December 2024



Sales comparison

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



Hong Kong Highlight Vehicle News

Hong Kong October 2024 Vehicle News

Hong Kong's passenger car sales stood at 3,829 rounds in October 2024 and 2,940 cars in September 2024, representing a month-on-month increase of 30.2%. With a sales volume of 875 units, Tesla continues to be the most popular car brand in the Hong Kong area.

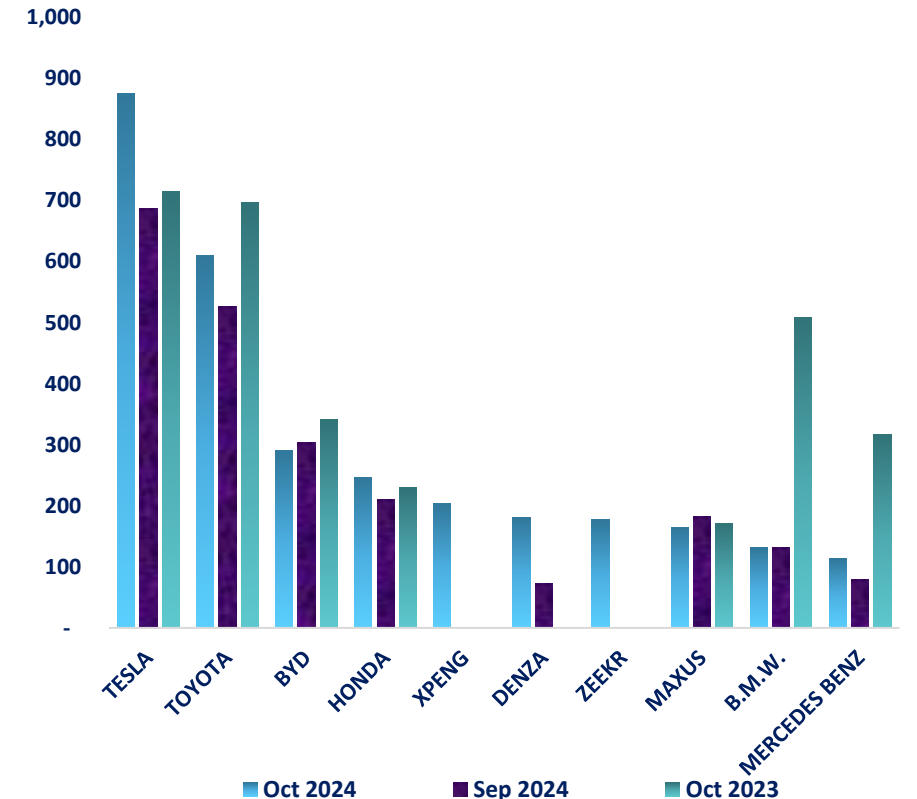
Toyota came in second with 610 cargos sold, up 16% month-on-month. BYD sales fell 4.6% month-on-month to third place. Honda's sales increased by 17.6% month-on-month to rank fourth. XPENG, which has just entered the Hong Kong market, is in fifth place with 203 units sold. The rest of the top 10 brands are sold by mainland DENZA, ZEEKR and MAXUS, which are selling more than the old luxury brands BMW and Mercedes-Benz. In terms of the overall market share, the scale of the new energy vehicle market continues to expand in Hong Kong, and the penetration rate of pure electric vehicles in the Hong Kong market has further increased.



■ Sales Comparison

Hong Kong's automotive market is becoming electrified

In October, TESLA won the top auto sales in Hong Kong, with a month-on-month increase of nearly 3%. Honda and Toyota, with monthly sales of 247 and 610 units, respectively, ranked 4th and 2nd. BYD was sandwiched between the two, in third place with 290 units. Several new mainland players also sold well in Hong Kong, with the ZEEKR in seventh place with 177 units, the DENZA in sixth with 181 units, and the XPENG in fifth place with 203 units. In eighth place was MAXUS, with 165 units sold. Mercedes-Benz and BMW, which sold 114 and 132 units respectively, ranked tenth and ninth.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for December 2024



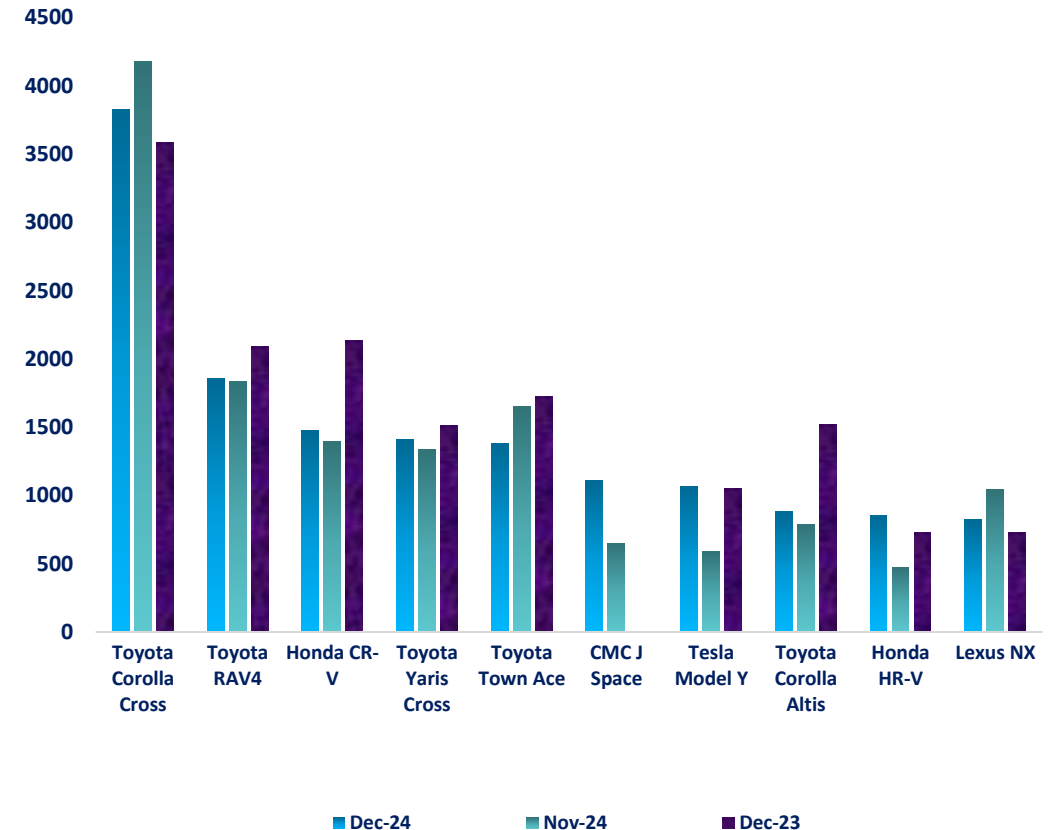
After the New Year's Eve fireworks, it has officially entered 2025, and the new car sales figures in Taiwan's auto market in 2024 have also been officially released, with a total of 41,302 licenses in the total market in the last month, with a monthly growth rate of 5.4%, but compared with December 2023, there is a decline of 4.3 percentage points. In terms of annual cumulative market performance, Taiwan's new car market has reached 457,30 units, a decline of about 4% compared to the annual cumulative performance of 476,987 units in 2023.

In 2023, Taiwan's new car market will hit a sales peak in recent years due to the lack of car dividends due to the digestion of the epidemic, but after the supply situation returns to stability, the natural market performance has gradually stabilized. In 2024, 220,503 units were imported, accounting for 48.2% of the total market, up slightly from 47% of the total market share in 2023. In addition, the self-made rate regulations for Taiwan cars that will be implemented in August 2024 will also have a significant impact on the market.

Sale Comparison

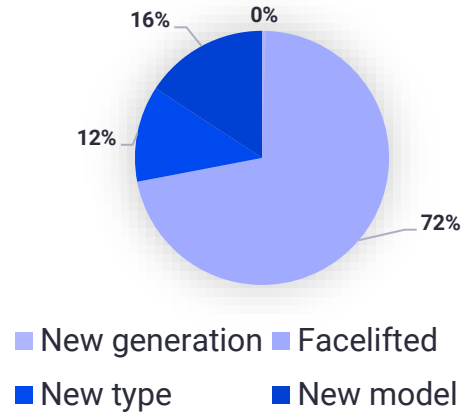
The overall market performance has gradually stabilized

Toyota Corolla Cross and Toyota RAV4 were the first and second runners-up in the market, with 3,827 and 1,860 units respectively taking the lead. Sales of the Honda CR-V fell 30.8% from November to third place with 1,477 units. Toyota's Yaris Cross sales fell 6.6% from November to fourth place with 1,410 units. Toyota's Town Ace ranked fifth with 1,381 units sold, while CMC J Space ranked sixth with 1,106 units sold. Finally, the Tesla Model Y, Toyota Corolla Altis, Honda HR-V, and Lexus NX ranked seventh, eighth, ninth, and tenth with 1,069, 882, 850, and 823 units, respectively.

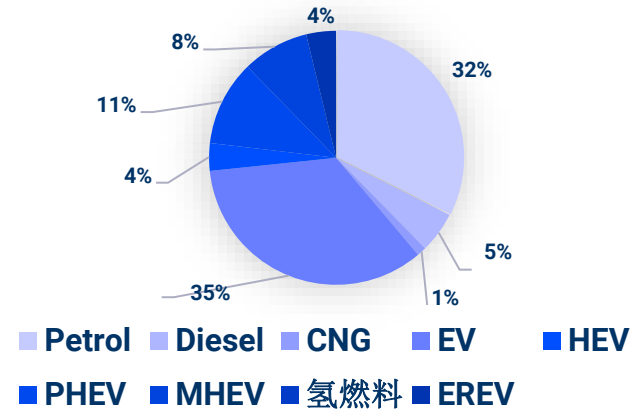


China JAN-DEC New Vehicle Analysis

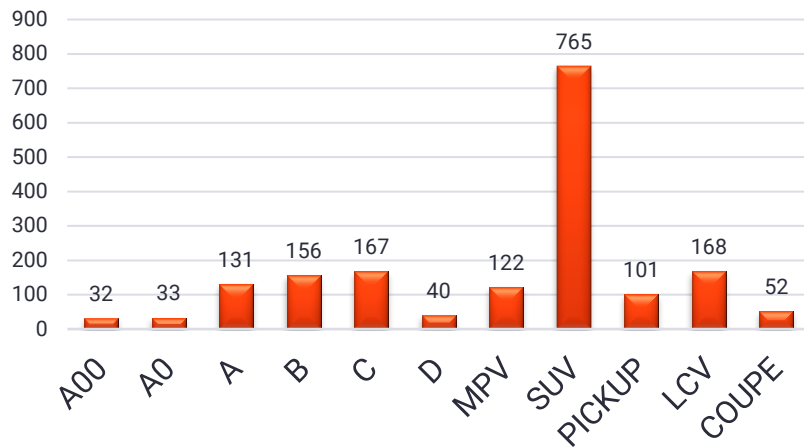
New vehicle statistics in KType



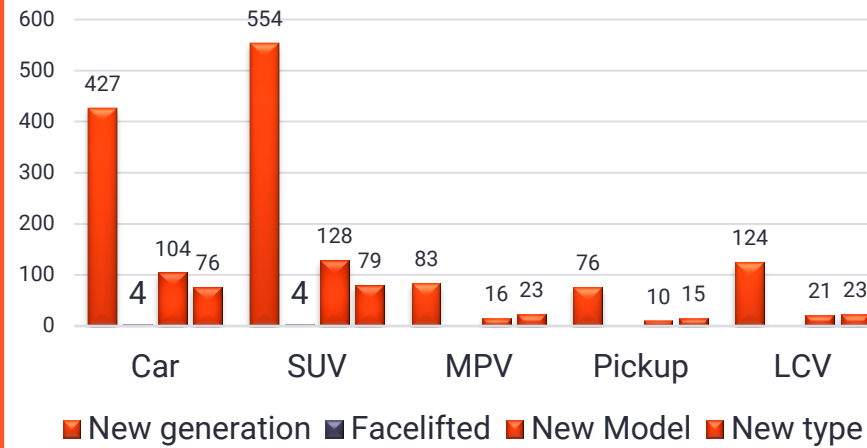
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to December 2024**, the total coverage of **K-Type** was **1767**, of which **495** 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 Vehicle Statistics

#	Brand	Total
1	BYD	68
2	CHERY	68
3	MERCEDES-BENZ	62
4	MAXUS	47
5	VW (FAW)	44
6	MERCEDES-BENZ (BBDC)	44
7	PORSCHE	40
8	CHANGAN	38
9	GEELY	34
10	VW (SVW)	31
11	HONGQI	31
12	JETOUR	29
13	JAC	28
14	TOYOTA (GAC)	27
15	AUDI	27
16	BMW	27
17	TOYOTA (FAW)	25
18	EXEED (CHERY)	25
19	CHANA	24
20	DEEPAL	24
21	GAC	22
22	ZEEKR	21
23	LYNK & CO	21
24	QIYUAN	20
25	SRM (BRILLIANCE)	19
26	SKYWORTH	19
27	JMC	19
28	WULING (SGMW)	18
29	BUICK (SGM)	18
30	FOTON	18

#	Brand	Total
31	FENGXING	17
32	ISUZU (JIANGXI)	17
33	BAW	17
34	BMW (BRILLIANCE)	17
35	DENZA	17
36	NETA (HOZON)	16
37	GAC NE	16
38	YUANHANG	16
39	AVATR	16
40	LEXUS	16
41	HONDA (GAC)	15
42	ARCFOX	14
43	LAND ROVER	14
44	LEAPMOTOR	14
45	DONGFENG XIAOKANG	13
46	NISSAN (DFAC)	13
47	FORD (CHANGAN)	13
48	BESTUNE	12
49	LINCOLN (CHANGAN)	12
50	VOLVO ASIA	12
51	LIVAN AUTO	12
52	AEOLUS	12
53	DONGFENG (DFAC)	11
54	NAC IVECO (NAVECO)	11
55	GALAXY	11
56	HAVAL	11
57	IM MOTORS	11
58	RCEV	11
59	GREAT WALL	11
60	ert	10

#	Brand	Total
61	BAIC-ORV	10
62	XPENG	10
63	VOYAH	10
64	AITO	9
65	i CAR	9
66	ZHONGXING (ZX AUTO)	9
67	AUDI (FAW)	9
68	FORD (JMC)	9
69	ROEWE (SAIC)	9
70	SKODA (SVW)	8
71	NIO	8
72	JINBEI	8
73	COWIN	7
74	VENUCIA	7
75	TANK	7
76	LUXEED	7
77	ORA	7
78	JAC EV	7
79	HYUNDAI (BEIJING)	7
80	KIA (DYK)	7
81	LOTUS	7
82	ALFA ROMEO	7
83	SMART	6
84	MG (SAIC)	6
85	SUBARU	6
86	JIYUE AUTO	6
87	PEUGEOT (DF-PSA)	6
88	JMEV	6
89	VOLVO	6
90	MASERATI	6

#	Brand	Total
91	FARIZON AUTO	6
92	MINI	6
93	ASTON MARTIN	6
94	KARRY	5
95	GENESIS	5
96	JETTA	5
97	NEW BAOJUN	5
98	HONDA (DONGFENG)	5
99	LIXIANG	5
100	REFINE	5
101	LAND ROVER (CHERY)	5
102	RADAR	5
103	NAMMI	4
104	GEOMETRY	4
105	CADILLAC (SGM)	4
106	AUDI (SAIC)	4
107	NISSAN (ZHENGZHOU)	4
108	HYPER	4
109	TESLA	4
110	LINXYS	4
111	LANDIAN	4
112	MAZDA (CHANGAN)	4
113	VW(ANHUI)	4
114	SMART	3
115	LINGBOX	3
116	KING LONG	3
117	BENTLEY	3
118	VICTORY	3
119	JAGUAR (CHERY)	3
120	M-HERO	3

#	Brand	Total
121	FORD USA	3
122	WEY	3
123	212	2
124	LEVC	2
125	SINOTRUK	2
126	ONVO	2
127	YANGWANG	2
128	BAIC	2
129	JEEP	2
130	NEOMOR	2
131	MERCEDES-BENZ (FJDA)	2
132	XIAOMI	2
133	JAGUAR	2
134	FANGCHENGBAO	2
135	POLESTAR	2
136	LINCOLN	2
137	MAPLE	2
138	CHENGSHI	2
139	FERRARI	2
140	HYUNDAI	2
141	ZD	2
142	MCLAREN	2
143	MINI	2
144	CITROËN (DF-PSA)	2
145	FAW (JILIN)	1
146	VGX	1
147	TOYOTA	1
148	JOYLONG	1
149	STELATO	1
150	SSANGYONG	1

#	Brand	Total
151	GMC	1
152	DAYUN	1
153	NEW GONOW AUTO	1
154	FORLAND	1
155	POLESTONES	1
156	LINGXI	1
157	EV HOUSE	1
158	INEOS	1
159	CHEVROLET (SGM)	1
160	LINGTU	1
161	FENGON	1

Remarks:

All statistical data is based on K-Type. From **January to December 2024**, the total coverage of **K-Type** was **1767**, of which **495** were **New K-Type**.

China VIO Report

CHINA VIO REPORT

VIO until 2024H1

China Mainland



VEHICLES IN OPERATION	VIO WITH KTYPE	KTYPE WITH VIO	VEHICLE BRANDS
307,974,057	307,968,657	10011	342

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

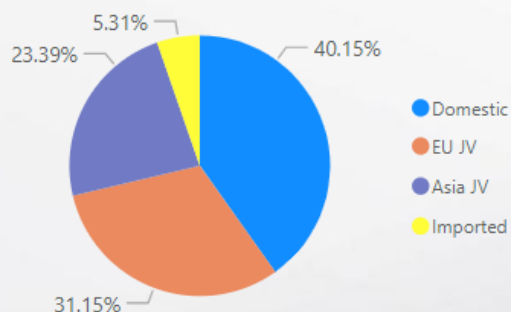
EU JOINT VENTURE CAR

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



K-TYPE / VIO COVERAGE BY SEGMENT



Coverage
99.96%
Domestic
123.6M
VIO COVERED



Coverage
99.98%
EU JV
95.9M
VIO COVERED



Coverage
99.95%
Asia JV
72.0M
VIO COVERED



Coverage
99.91%
Imported
16.3M
VIO COVERED

TOP1 VEHICLE BASED ON VIO



VW (SVW)



LAVIDA

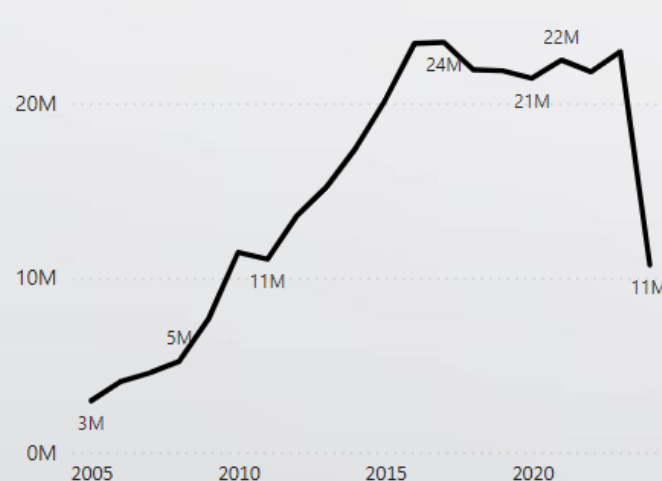
VIO OF TOP 1 VEHICLE

1,811,648

POPULATION SHARE

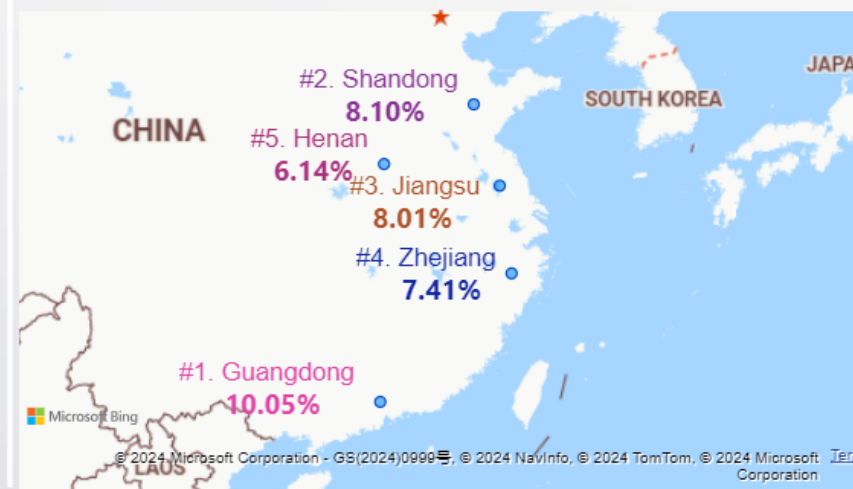
0.61%

TREND OF REGISTRATION FROM 2005 TO 2024H1 (Overall PC)



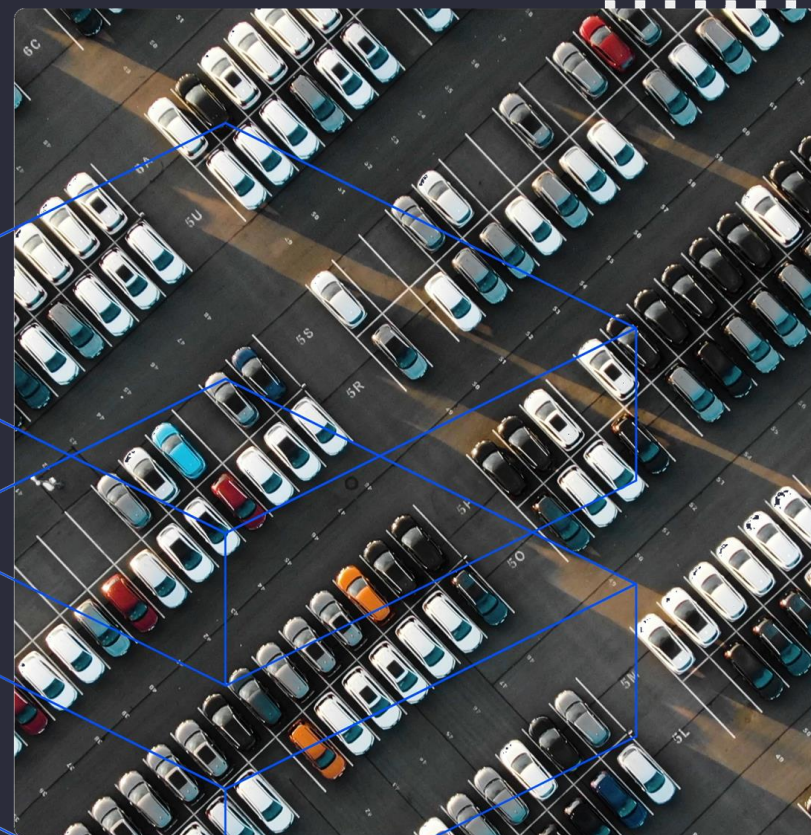
TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2024H1)



02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types Researched | YTD 2024

9278

Generic Articles Researched | YTD 2024

232

OE Numbers Researched | YTD 2024

377491

Vehicle Brands Covered | YTD 2024

219

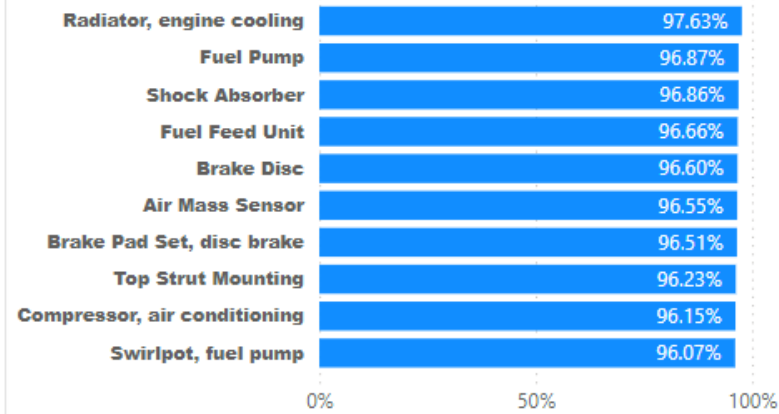


CHINA

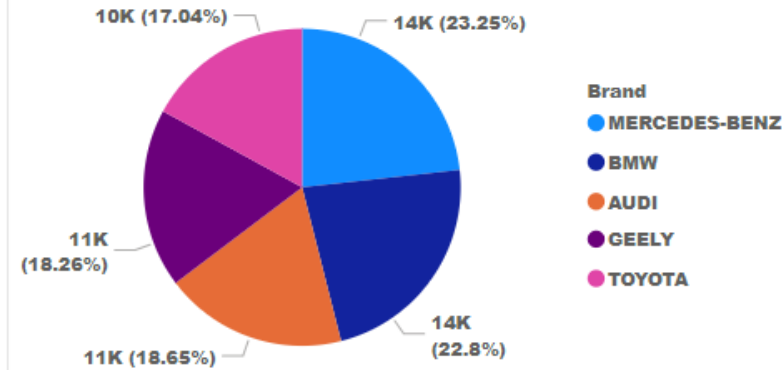
2024

Dece...

Top 10 Generic Articles by Coverage

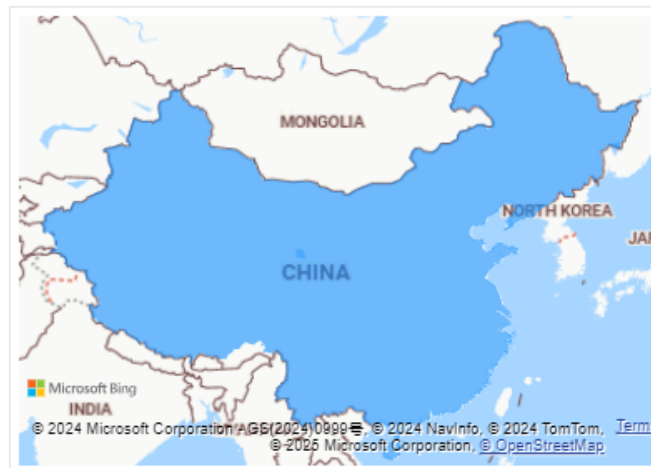


Top 5 Vehicle Brands by Total Number OE

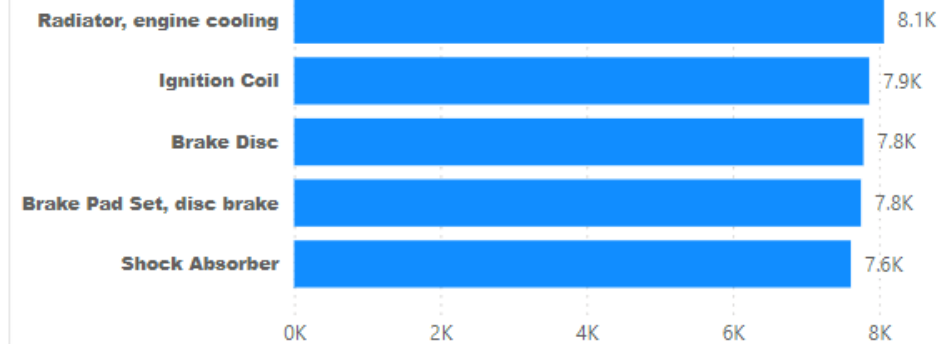


Total numbers of OE for MERCEDES-BENZ

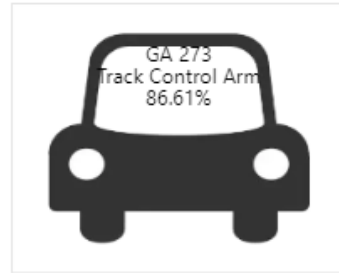
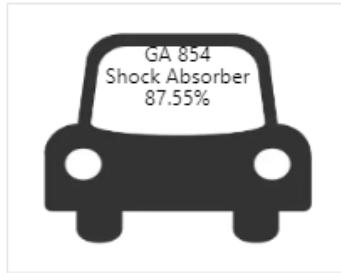
14K



Top 5 Generic Articles by K-Types



OE Coverage by VIO



NUMBER of GA for
NEV

10

NUMBER of GA for
NEV & ICE

63

Nov-2024 Update

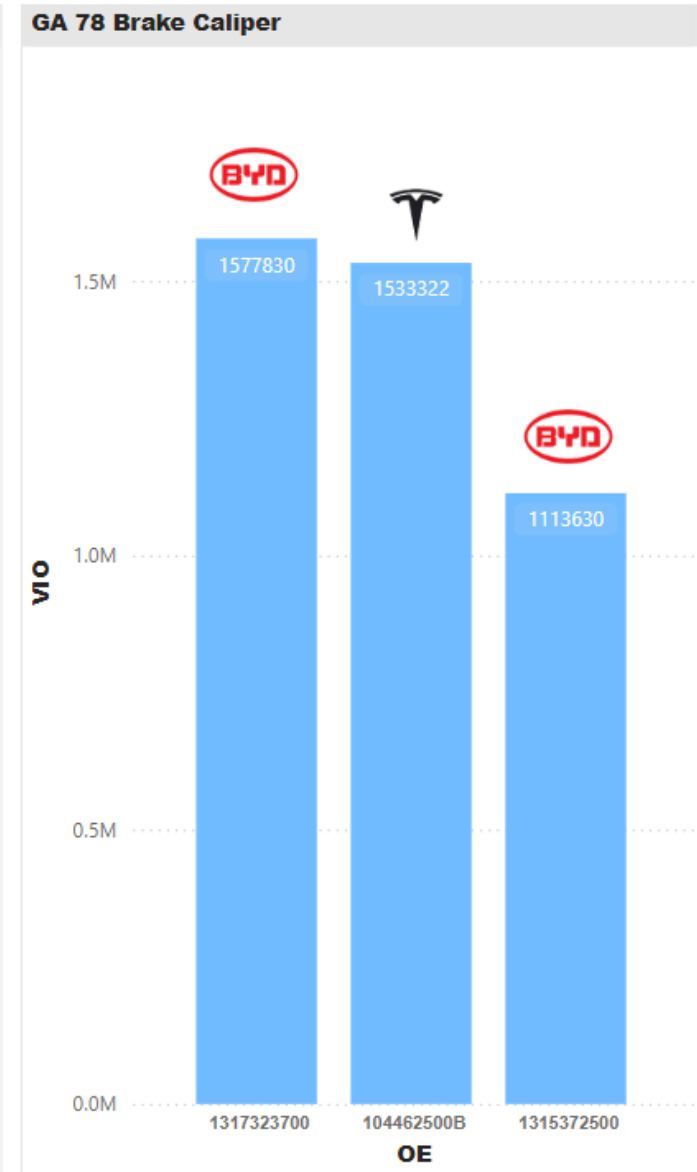
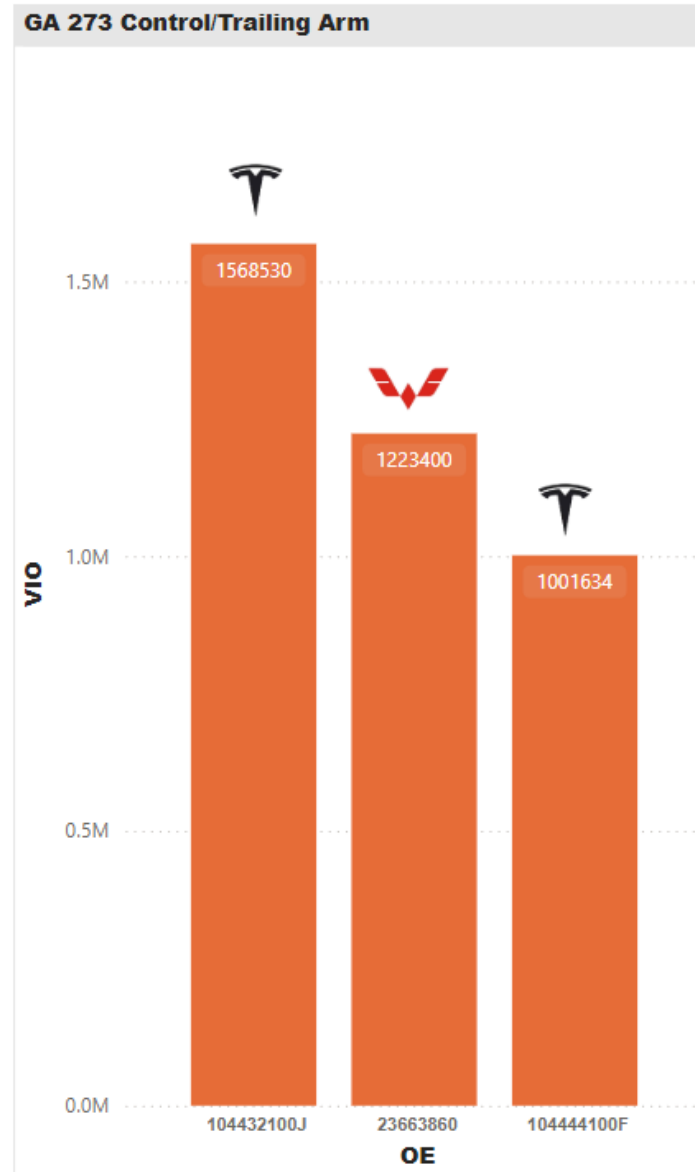
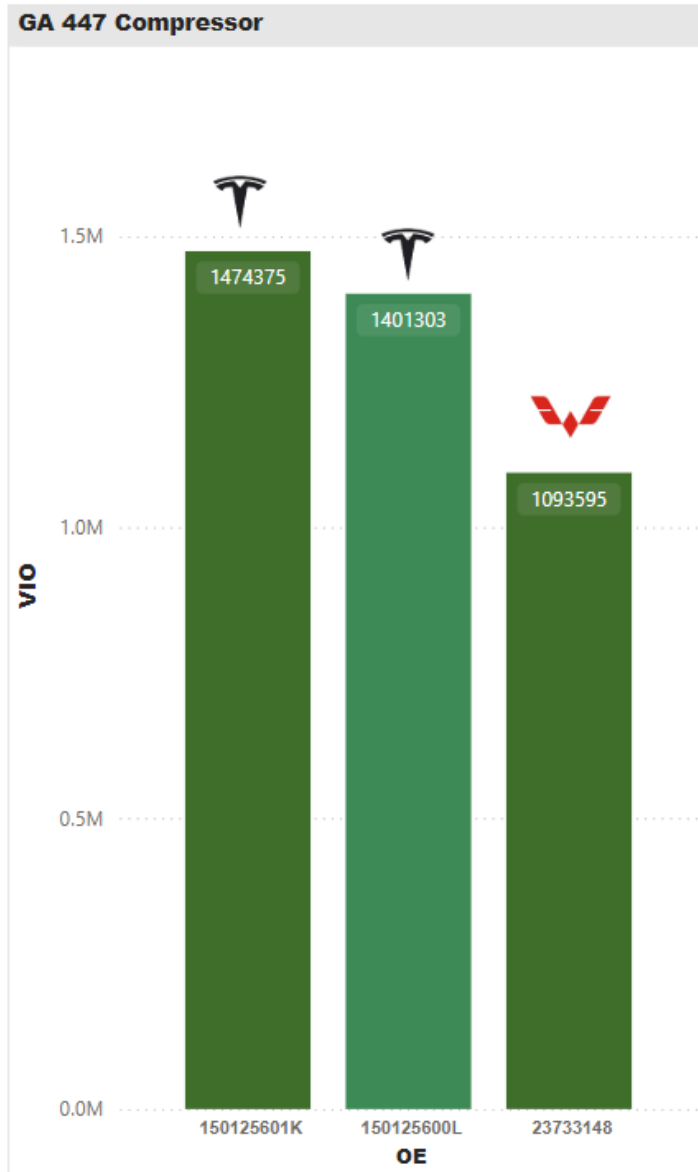
Based on 2024H1

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
854	Shock Absorber	87.55%
286	Steering Gear	86.66%
273	Track Control Arm	86.61%
447	Compressors	85.33%
298	Wiper Blade	84.74%
424	Interior air Filter	83.61%
402	Pad (disc brake)	81.75%
82	Disc	81.48%
654	Wheel Bearing Kit	80.36%
448	Condenser	79.62%
1	Starter Battery	79.03%
78	Caliper cylinder (housing)	78.57%
83	Brake hose	78.30%
508	Radiator Fan Complete	77.03%
793	Electric Motor Blower	76.62%
412	Sensor, wheel speed	74.50%
3229	Link,(Rod/Strut) stabilizer	73.78%
13	Drive Shaft	68.36%
1561	Regulator>window	67.31%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
471	Evaporators	66.49%
219	Gas spring boot-/cargo area	66.21%
1351	Additional Water Pump	66.00%
467	Heat Exchanger, interior heating	65.08%
5031	Radiator, Drive Battery	64.85%
1211	Steering Column	63.71%
397	Expansion Tank, coolant	63.12%
1180	Suspension Strut Support Mounting	62.55%
1182	Rubber Buffer, suspension	56.67%
3365	Cover/Rubber Boot, shock absorber	55.80%
247	Mounting, engine	54.19%
914	Tie Rod End	53.79%
183	Expansion Valve, air conditioning	53.44%
1626	Friction Bearing	52.15%
2232	Wheel Sensor,tyre pressure control system	48.68%
258	Brake Master Cylinder	39.33%
200	Electro Motor, window regulator	39.04%
8558	Battery Pack/48 V Battery	34.52%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
2462	Ball Joint,(Support-/Controlarm Link)	31.88%
51	Axial Joint (steering)	29.57%
331	Bushing, stabilizer	29.08%
5761	Charge Cable, electric vehicle	28.58%
5314	Screw Set, brake disc	28.15%
60573	Electromotor	27.93%
60506	Inverter Converter	27.18%
514	Gas spring engine flap	24.82%
191	Bellows (steering)	24.03%
60172	Charger, Traction battery	23.47%
123	Drum	21.74%
70	Shoe (drum brake)	20.76%
851	Receiver Driers	20.03%
301	Wiper Arm,windscreen washer	19.07%
251	Control Arm-/Trailing Arm Bush	19.05%
655	Wheel Bearing	17.89%
124	Primary handbrake cable	17.89%
60173	Control Unit, battery management	16.91%

Top 3 Coverage of OE by VIO



PADS NEV Dashboard

**K-TYPES Researched
YTD 2024**

693

**OE NOs Researched
YTD 2024**

22,013

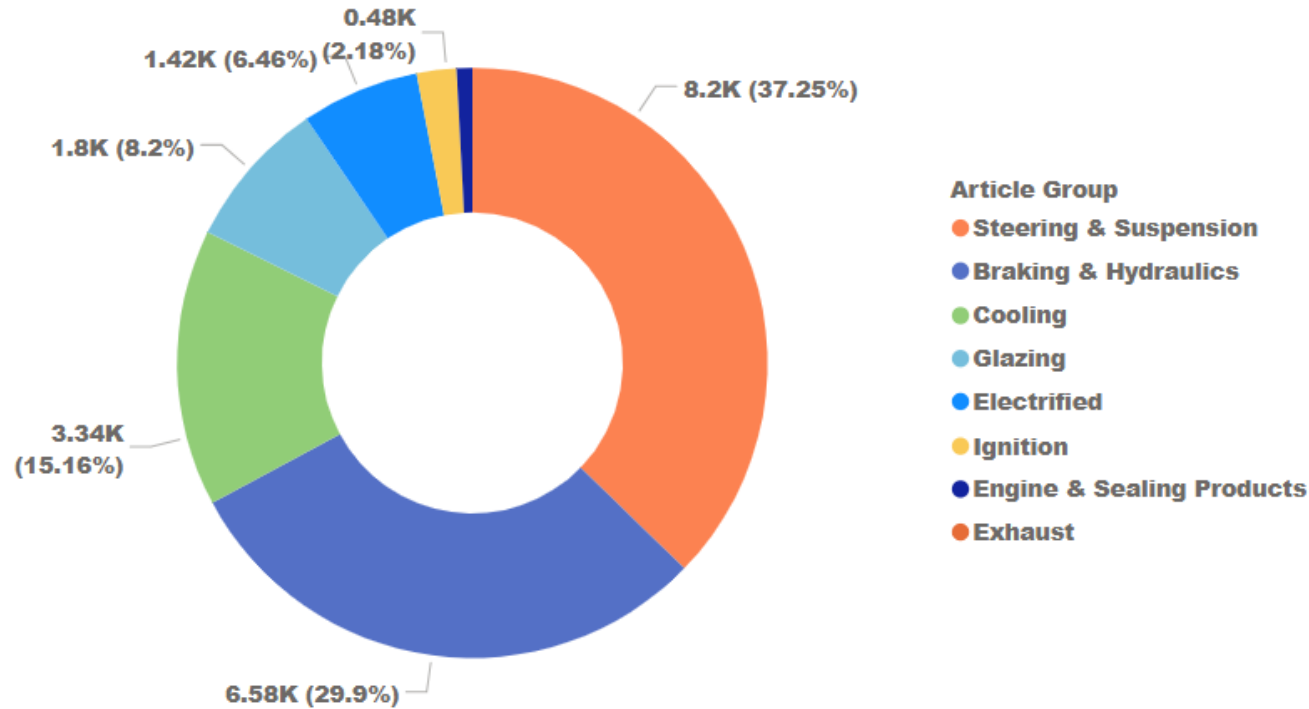
**GA Researched YTD
2024**

107

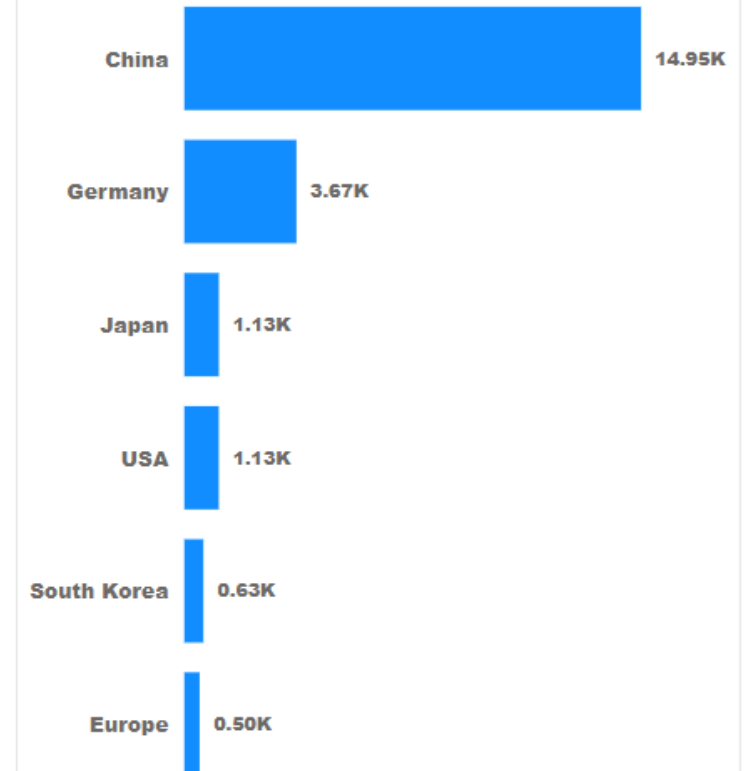
**Vehicle Brands Covered
YTD 2024**

111

Total Group by Number of OE



Total Brand Series by Number of OE



03

Company News

- **TecAlliance China Customer Training Workshop – Shanghai**
- **Automechanika Shanghai 2024 Recap**
- **Happy Chinese New Year 2025!**



TecAlliance China Customer Training Workshop - Shanghai



Shanghai, China (November 20th, 2024) - TecAlliance China held a customer training workshop in their Shanghai office, with the theme of “Discussing the layout and management of globalization, explaining the application and practice of data, and promoting the global business development of the automotive aftermarket together”. The training day was a full house and a complete success. The trainers of TecAlliance shared the professional and rich knowledge of the automotive aftermarket along with four topics, which are summarized as bellowed:

- **Globalization Management and Local Application**

The trainer introduced the topic of how enterprises can achieve global standardized management and regional flexible application through digital transformation and data asset precipitation.

- **Culture and Standards in the North American Market**

A detailed introduction to the North American market, a popular foreign trade trend in recent years, from frameworks and standards to data utilization and value creation. The structure of the North American automotive aftermarket and the structure of the data were explained in detail.

- **Practical exercises and explanations of auto parts data processing**

The trainer demonstrated some data organizing skills for customers through the on-site operation of data processing tools, including common functions that can help customers to significantly reduce repetitive data operations, as well as the database correlation for data analysis between tables.

- **The application of data management platform**

In order to provide better and more convenient services to customers, the training emphasized the importance of the system at the operational level, which can bring enterprises a highly integrated data application experience, reduce data loss caused by personnel turnover, and enhance the unified management of data assets.



Automechanika Shanghai 2024 Recap



- **TecDoc: Driving Data Excellence**

At the core of our offering was TecDoc, a trusted global standard for automotive parts data. During the event, we highlighted the importance of comprehensive and accurate vehicle and parts data for suppliers, distributors, and workshops. The product promotion of TecDoc ONE provided a detailed look at how TecDoc's latest solutions are transforming the way our customers handle data. Additionally, TecDoc OE and TecDoc PMA introduction emphasized the evolution of our platform in response to the industry's growing need for precision and efficiency.

- **TecCom: Streamlining Order and Returns Management**

Our TecCom platform received significant attention throughout Automechanika Shanghai. The product team explained to the professional visitors how TecCom enhances communication and processes between parts manufacturers, wholesalers, and buyers. The demo on TecCom Returns showcased our advanced solutions for managing product returns, which continue to improve efficiency and customer satisfaction. With a focus on simplifying the supply chain, TecCom is driving significant improvements in both operational speed and accuracy.

- **TecRMI: Empowering Workshops with Repair and Maintenance Data**

TecRMI, our Repair and Maintenance Information service, was another key focus at the event. Workshops and technicians rely heavily on precise, up-to-date repair instructions and data to stay competitive in today's fast-paced environment. We dedicated multiple sessions to demonstrating the practical applications of TecRMI's capabilities, from Direct Acceptance procedures to Service Book updates, helping workshops streamline their operations and deliver high-quality services to customers.

During the whole event, our team engaged with visitors and customers through informative sessions, product demonstrations, and engaging discussions.

Automechanika Shanghai 2024 was a successful event, which enabled us to share our latest innovations, listen to the needs of our customers, and deepen our partnerships across the global automotive ecosystem.

Happy Chinese New Year 2025!

灵蛇 2025 乙巳年 献瑞

春节放假通知

HAPPY NEW YEAR

泰案联春节放假安排

一	二	三	四	五	六	日
20	21	22	23	24	25	26 班
27	28 除夕 休	29 春节 休	30 初二 休	31 初三 休	1 初四 休	2 初五 休
3 初六 休	4 初七 休	5	6	7	8 班	9

1月28日-2月4日 放假8天;
1月26日(周日)、2月8日(周六)正常上班。



©假期期间紧急联系方式:
support.cn@tecalliance.net

提前祝大家新年快乐, 万事如意!

Contact Us

Part Manufacturers & Brand Owners China-Mainland



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KAM (Key Account Management) E-commerce



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