

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version July and August 2024

30 YEARS

TecDoc

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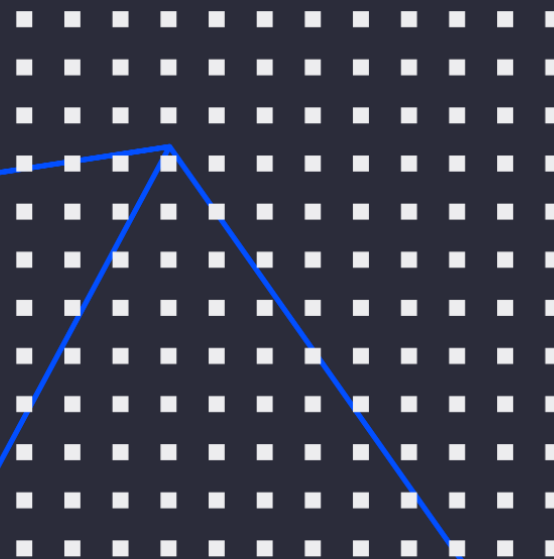
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01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



Honda China will cut production capacity by nearly 20% by closing two production lines



- Recently, Honda China announced that it will optimize its current production capacity to accelerate its electrification transformation. Honda China stated that Honda has 7 automobile production lines in China, with a total annual production capacity of 1.49 million units. Currently, Honda is transitioning to new energy, and after adjustment, Honda's total automobile production capacity in China has increased from 1.49 million units to 1.2 million units.
- Honda(GAC) stated that the company currently has 4 complete vehicle production lines (with an annual production capacity of 770000 units) and 1 production line under construction (with a designed annual production capacity of 120000 units). The fourth production line with an annual production capacity of 50000 units is planned to be closed in October 2024, and the new energy production line under construction will be put into operation in November 2024.
- Honda(DFAC) plans to shut down its second production line with an annual capacity of 240000 units in November 2024, and the new electric dedicated factory under construction will be put into operation in September 2024.
- Due to the impact of the price war among Chinese car companies, Honda's sales in June fell by 40% year-on-year. However, China remains the world's largest automobile market, and Japanese car companies are accelerating their transformation by launching pure electric vehicles and plug-in hybrid cars to turn the tide

China Mainland Highlight Vehicle News

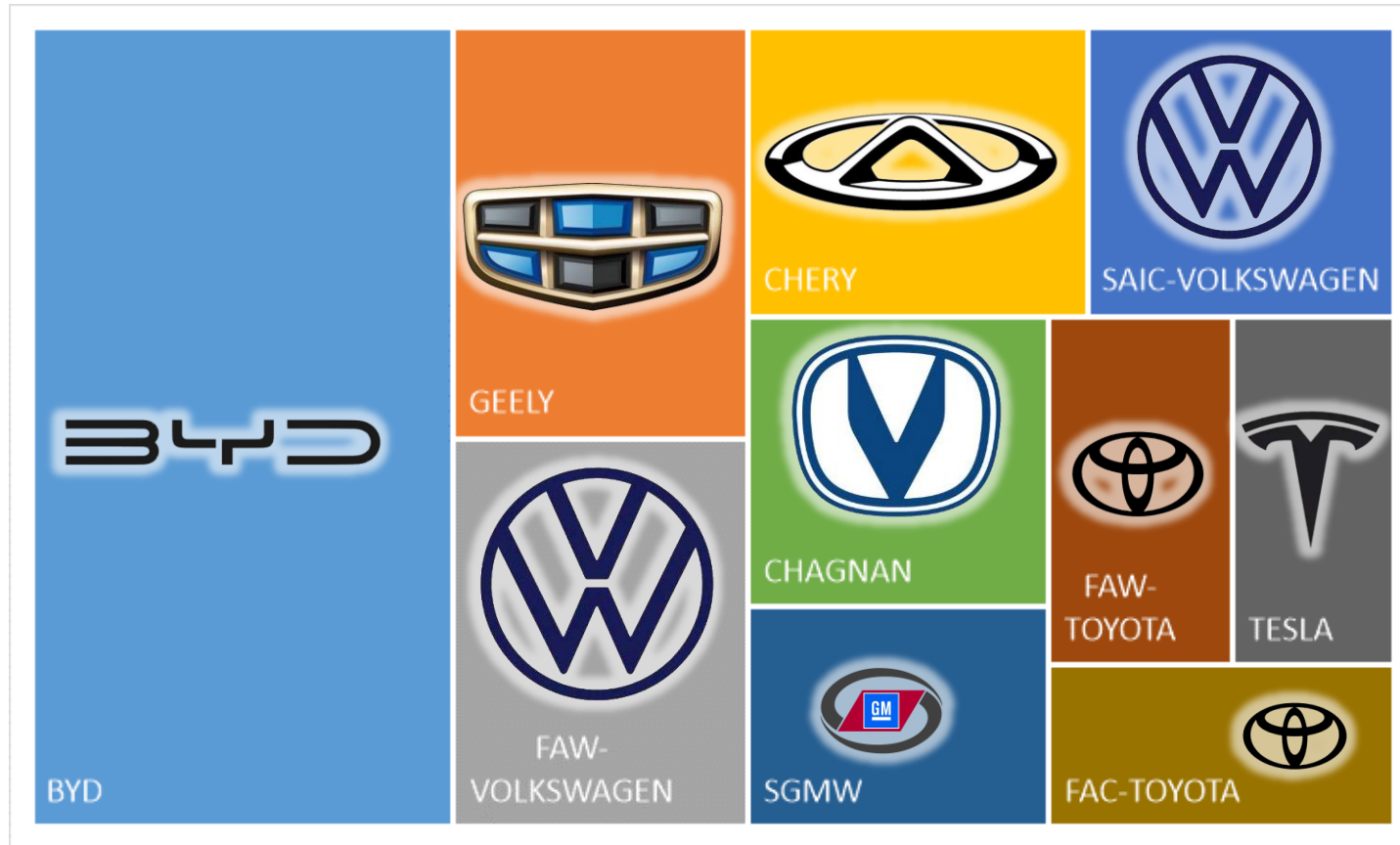
Or based on G9 research and development, Xiaopeng's first extended range car will be mass-produced in the second half of 2025!



- According to reports, insiders of Xiaopeng Motors have revealed that its extended range vehicle project will be launched "no later than the fourth quarter of next year", and Xiaopeng will form two product arrays of pure electric and extended range models at that time.
- According to informed sources, Xiaopeng's first range extender will be a large SUV with internal project code G01, "developed based on the G9 prototype, mainly targeting price ranges above 200000 yuan". The first car will be mass-produced and produced at Xiaopeng Motors' Guangzhou Huangpu Second Factory, and its range extender supplier has been designated as Dong'an Power. As a reference, Dong'an Power has previously provided range extender components for Ideal Automobile, and the powertrain of the new 212 off-road vehicle launched in August is also produced by Dong'an Power.
- However, there are also reports that Xiaopeng's first extended range car may be the "mother ship" of Xiaopeng's Huitian land carrier. According to previous reports, the Xiaopeng Huitian land carrier will make its first manned flight during the Zhuhai Air Show in November this year, with a price not exceeding 2 million yuan. The size of its mother ship is 5.5 meters long, 2 meters wide, and 2 meters high, with a design of 3 axles and 6 wheels, all of which are involved in driving. It is worth noting that one can drive with a C driver's license.

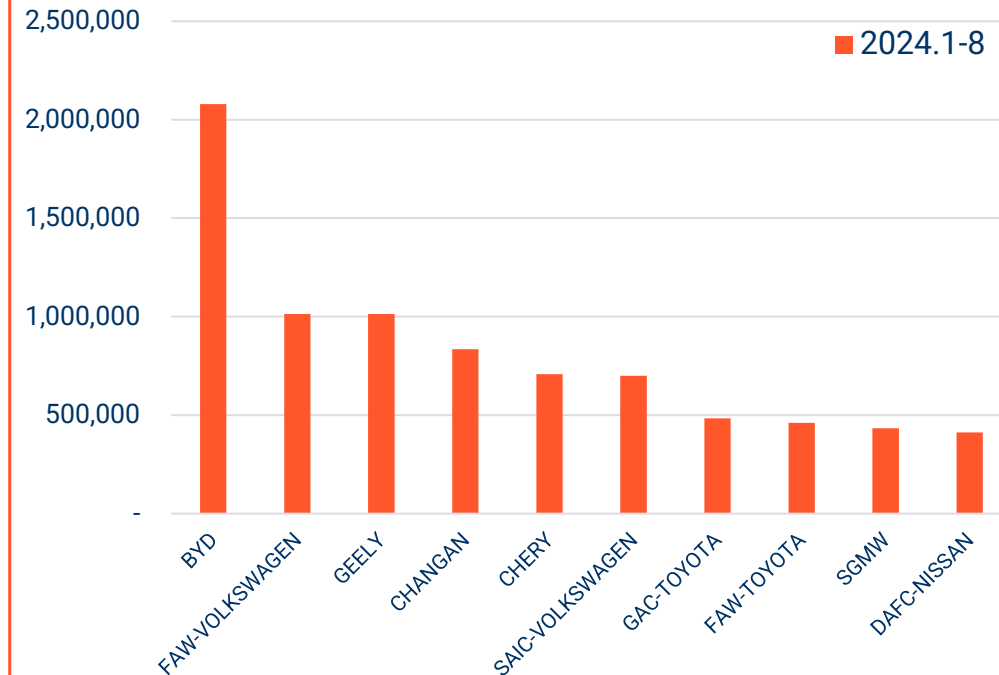
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in August 2024



Sales comparison

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



Hong Kong Highlight Vehicle News

Hong Kong June 2024 Vehicle News

Hong Kong passenger car sales in May 2024 were 2,849 units, compared to 6,435 units in April 2024, a 55.7% month-on-month plunge. Toyota sold 652 units, down 6.9% month-on-month, and regained its position as the most popular car brand in Hong Kong.

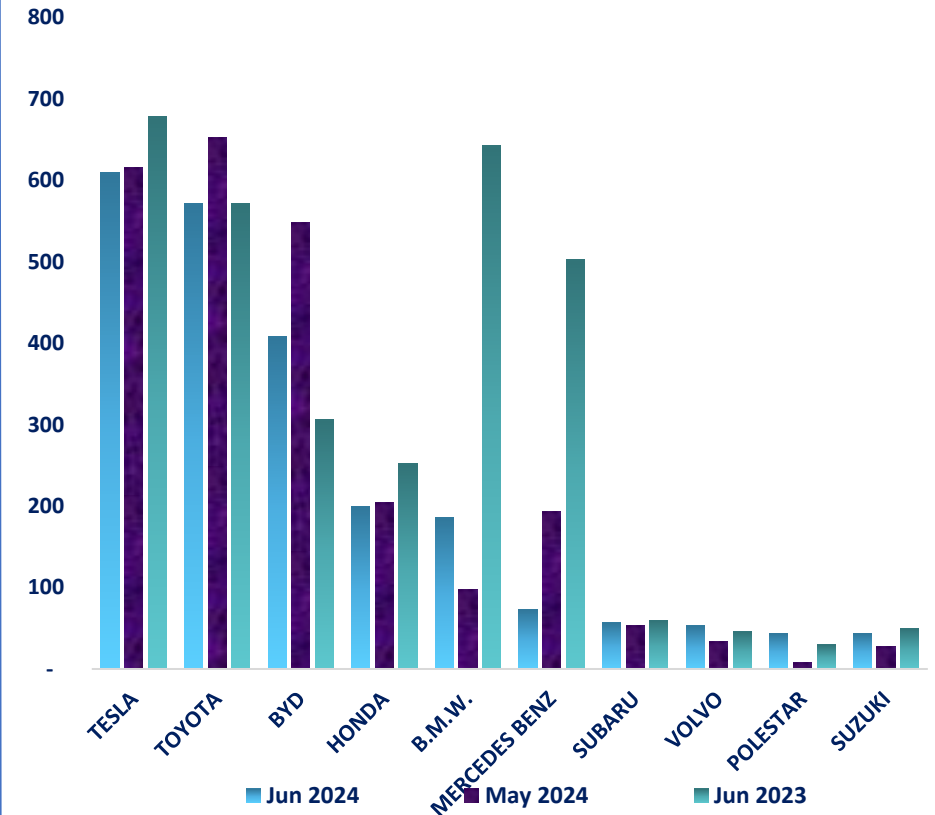
Tesla came in second with 616 units sold, up 17.8% month-on-month. BYD's sales rose 9.4% month-on-month, ranking third. Honda's sales rose 5.2% month-on-month, ranking fourth. Mercedes-Benz came in fifth place with 193 units sold. The monthly sales of the remaining top 10 brands all showed varying degrees of decline. Overall, sales in the entire automotive market are sluggish.



Sales Comparison

Total vehicle sales are sluggish

In June, Tesla regained its position as the most popular automaker in Hong Kong. Toyota's sales fell month-on-month and ranked second. BYD's sales fell month-on-month, ranking third. Honda's sales fell month-on-month and ranked fourth. BMW's sales soared month-on-month, ranking fifth. In the end, Mercedes-Benz, Subaru, Volvo, Polestar and Suzuki are in the bottom five.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for August 2024



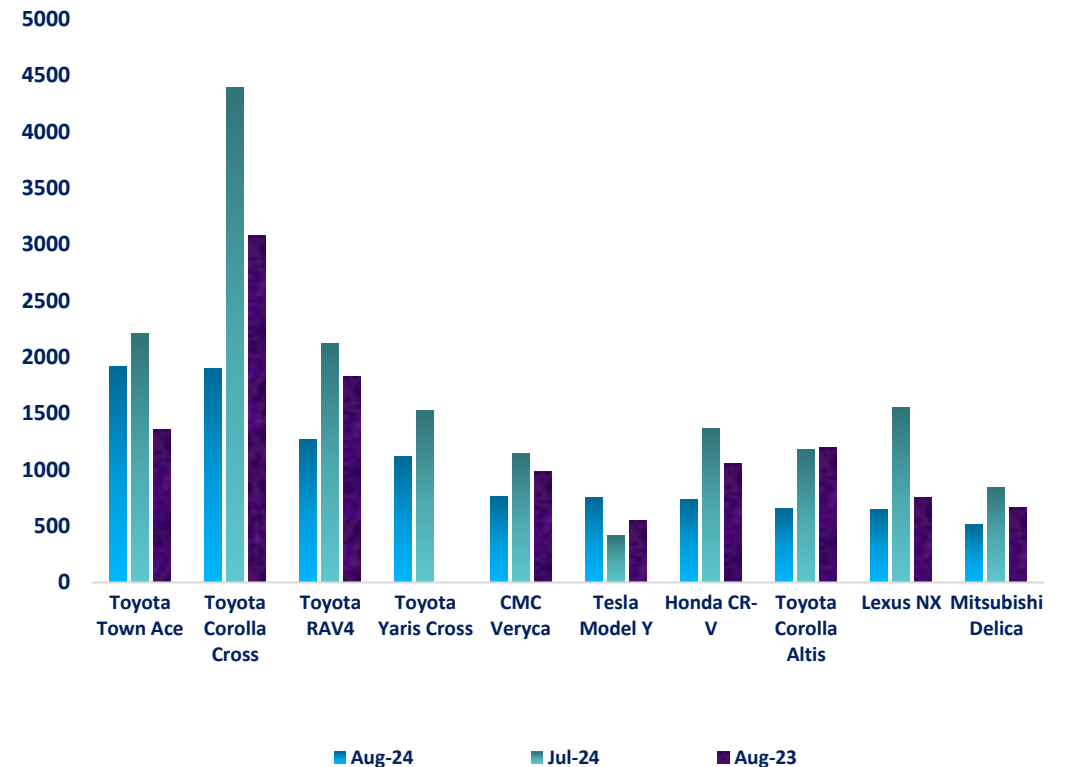
In the new car market in Taiwan in August 2024, some Taiwan car factories arrange a summer break for production lines, and at the same time, since August 4, it has also entered the traditional folk month, and consumers generally do not prefer the folk month license, so in the past, the folk month was a period of recuperation for the production line and distribution system, and the number of new car licenses in August will decline relative to July.

In the uncertain atmosphere of the new car market, the sales volume in August was only 29,403 units, which was less than 30,000 units, a decline of 35.6% compared to July, and although the cumulative sales in August of the year exceeded the 300,000 mark with 307,584 units, the sluggish August sales volume made the cumulative sales of the same period last year slightly ahead of the cumulative sales of 0.3% in July, and the reversal in August reached 1.6%.

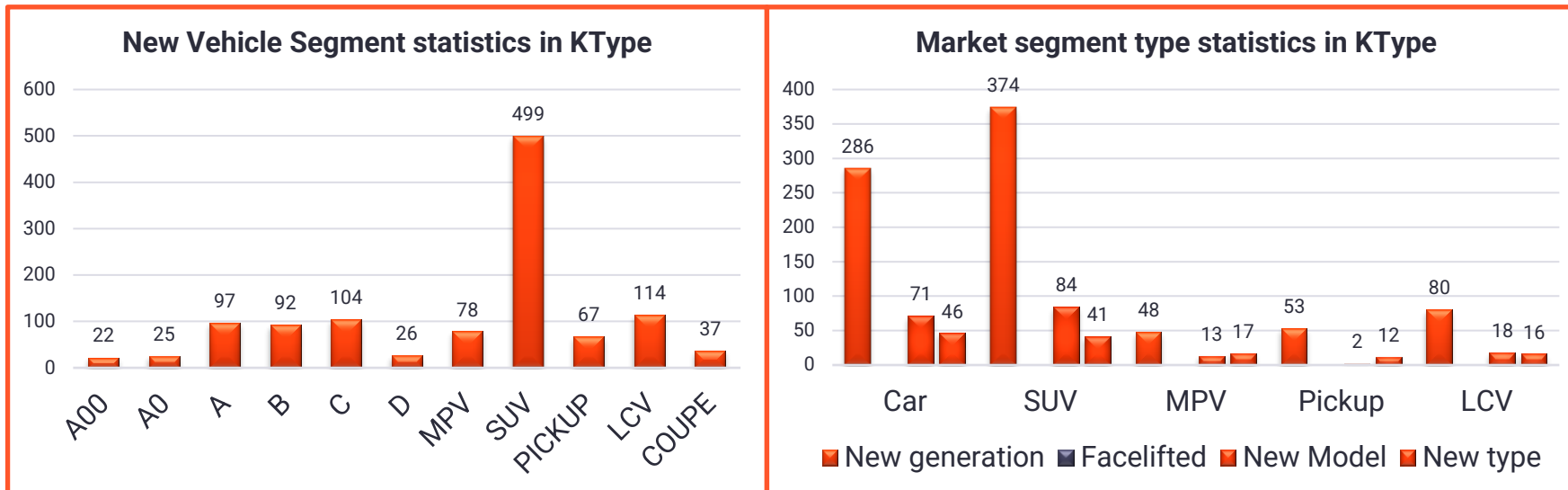
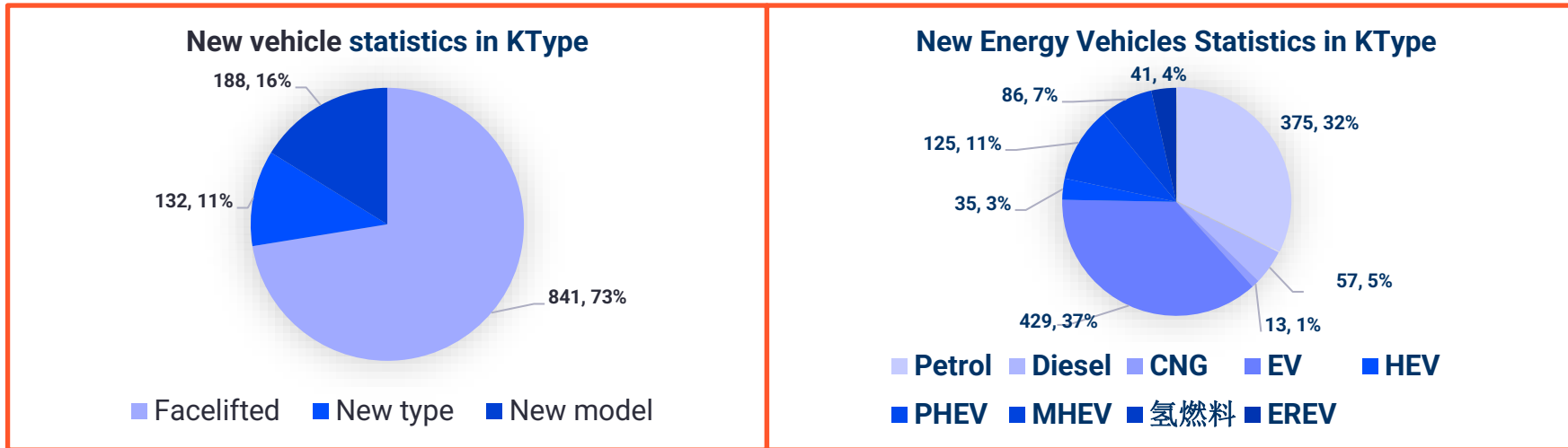
■ Sale Comparison

Sales performance in Taiwan market were sluggish

The sales volume of the top 10 automakers in the total market fell by 35.6% compared to July, and the sales volume of each model series was not too impressive. Toyota Town Ace and Toyota Corolla Cross topped the market with 1,914 and 1,903 units respectively. Toyota's RAV4 sales performance has declined by as much as 4% compared with July, and it still ranks third with 1,271 units. Toyota Yaris Cross was in fourth place with 1,115 units. CMC Veryca ranked fifth with 763 units sold, and Tesla Model Y ranked sixth with 755 units sold. Finally, Honda CR-V, Toyota Corolla Altis, Lexus NX, and Mitsubishi Delica ranked seventh, eighth, ninth, and tenth with 733, 656, 646, and 515 units, respectively.



China JAN-AUG New Vehicle Analysis



Remarks:

All statistical data is based on K-Type. From **January to August 2024**, the total coverage of **K-Type** was **1161**, of which **320** 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	58
2	CHERY	42
3	MERCEDES-BENZ	41
4	MAXUS	36
5	MERCEDES-BENZ (BBDC)	34
6	PORSCHE	31
7	CHANGAN	30
8	VW (FAW)	30
9	TOYOTA (GAC)	24
10	VW (SVW)	23
11	GEELY	23
12	JAC	23
13	EXEED (CHERY)	20
14	BMW	20
15	JETOUR	20
16	HONGQI	20
17	ZEEKR	18
18	CHANA	17
19	GAC	17
20	NETA (HOZON)	16
21	TOYOTA (FAW)	16
22	WULING (SGMW)	15
23	SRM (BRILLIANCE)	14
24	DEEPAL	14
25	LEAPMOTOR	14
26	FOTON	14
27	ISUZU (JIANGXI)	13
28	AUDI	12
29	ARCFOX	12
30	SKYWORTH	12

#	Brand	Total
31	GREAT WALL	12
32	YUANHANG	11
33	LYNK & CO	11
34	JMC	11
35	BUICK (SGM)	11
36	BAW	11
37	GAC NE	10
38	RCEV	10
39	BAIC-ORV	10
40	AEOLUS	9
41	DENZA	9
42	NISSAN (DFAC)	8
43	GALAXY	8
44	HONDA (GAC)	8
45	LIVAN AUTO	8
46	er	8
47	HAVAL	8
48	JINBEI	8
49	VOLVO ASIA	8
50	LEXUS	7
51	LOTUS	7
52	NIO	7
53	IM MOTORS	7
54	LINCOLN (CHANGAN)	7
55	QIYUAN	7
56	AITO	7
57	XPENG	6
58	SMART	6
59	AVATR	6
60	JAC EV	6

#	Brand	Total
61	FENGXING	6
62	TANK	6
63	HYUNDAI (BEIJING)	6
64	ORA	6
65	BMW (BRILLIANCE)	5
66	LIXIANG	5
67	i CAR	5
68	VOYAH	5
69	ALFA ROMEO	5
70	PEUGEOT (DF-PSA)	5
71	LAND ROVER (CHERY)	5
72	COWIN	5
73	GEOMETRY	4
74	REFINE	4
75	TESLA	4
76	NISSAN (ZHENGZHOU)	4
77	AUDI (SAIC)	4
78	FORD (JMC)	4
79	DONGFENG XIAOKANG	4
80	SUBARU	4
81	HONDA (DONGFENG)	4
82	BESTUNE	4
83	VENUCIA	4
84	ZHONGXING (ZX AUTO)	4
85	NAMMI	3
86	KIA (DYK)	3
87	FORD USA	3
88	JAGUAR (CHERY)	3
89	LINXYS	3
90	MINI	3

#	Brand	Total
91	DONGFENG (DFAC)	3
92	MASERATI	3
93	NAC IVECO (NAVECO)	3
94	RADAR	3
95	ASTON MARTIN	3
96	GENESIS	3
97	FORD (CHANGAN)	3
98	JMEV	3
99	JIYUE AUTO	3
100	KING LONG	2
101	FARIZON AUTO	2
102	YANGWANG	2
103	HYPER	2
104	MAZDA (CHANGAN)	2
105	BAIC	2
106	XIAOMI	2
107	CITROËN (DF-PSA)	2
108	LUXEED	2
109	NEW BAOJUN	2
110	ZD	2
111	POLESTAR	2
112	JETTA	2
113	CADILLAC (SGM)	2
114	WEY	2
115	ROEWE (SAIC)	2
116	MCLAREN	2
117	FERRARI	2
118	KARRY	2
119	LEVC	2
120	JAGUAR	2

#	Brand	Total
121	CHENGSHI	2
122	VICTORY	2
123	VW(ANHUI)	2
124	MERCEDES-BENZ (FJDA)	2
125	MINI	2
126	LINCOLN	1
127	LINGBOX	1
128	EV HOUSE	1
129	MG (SAIC)	1
130	FORLAND	1
131	SKODA (SVW)	1
132	FENGON	1
133	LANDIAN	1
134	LAND ROVER	1
135	TOYOTA	1
136	FANGCHENGBAO	1
137	CHEVROLET (SGM)	1
138	FAW (JILIN)	1
139	DAYUN	1
140	NEW GONOW AUTO	1
141	AUDI (FAW)	1
142	MAPLE	1
143	JEEP	1
144	POLESTONES	1
145	212	1
146	HYUNDAI	1

Remarks:

All statistical data is based on K-Type. From **January to August 2024**, the total coverage of **K-Type** was **1161**, of which **320** were **New K-Type**.

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

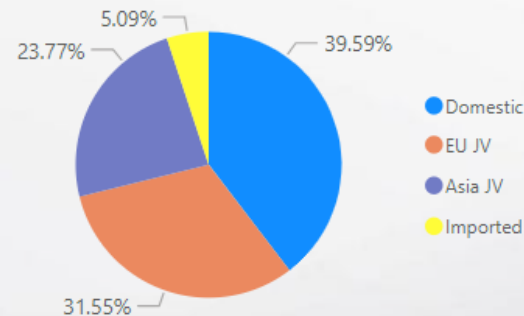
EU JOINT VENTURE CAR

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)



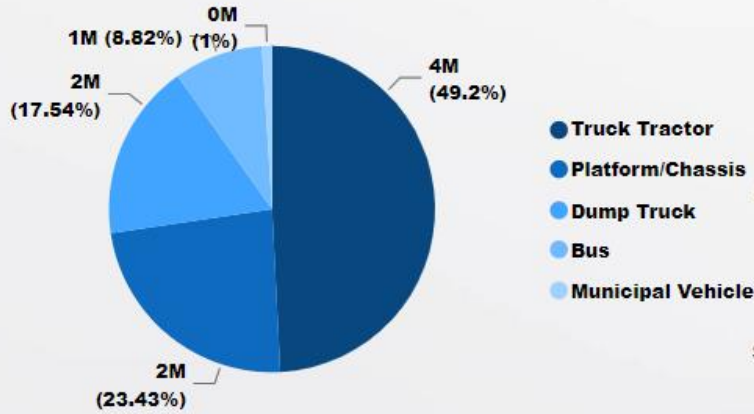
China CV VIO Report

TecAlliance CHINA CV VIO REPORT

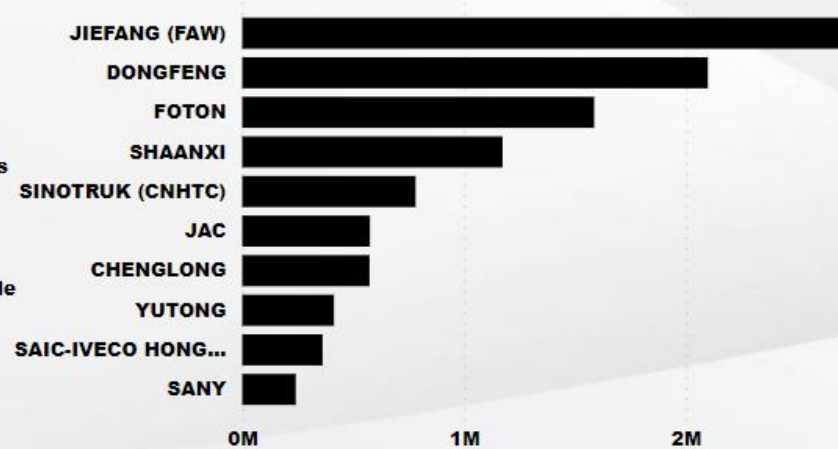
VIO until 2023H1
Data based on ChinaID level data

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

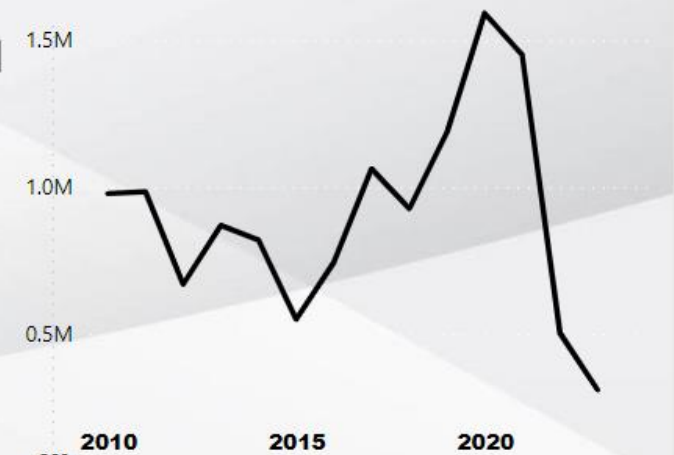
VIO By Body type



Top 10 BRANDS by VIO



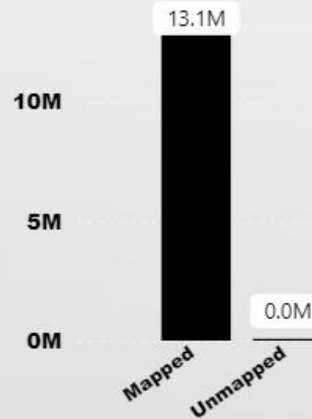
REGISTRATION TREND by YEAR



TOP 5 PROVINCE by VIO



N-TYPE/VIO COVERAGE

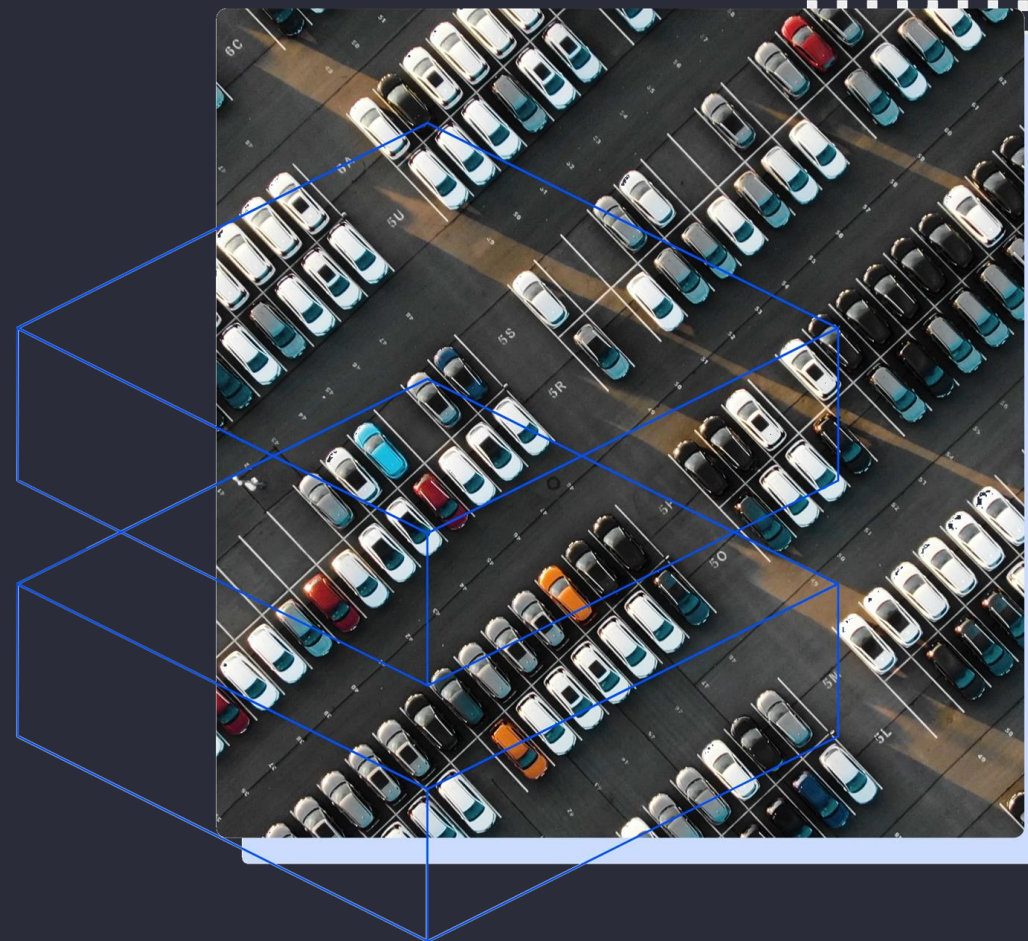


TOP 3 VEHICLE IN OPERATION

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

02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types Researched | YTD 2024

9109

Generic Articles Researched | YTD 2024

228

OE Numbers Researched | YTD 2024

363200

Vehicle Brands Covered | YTD 2024

219



CHINA

2024

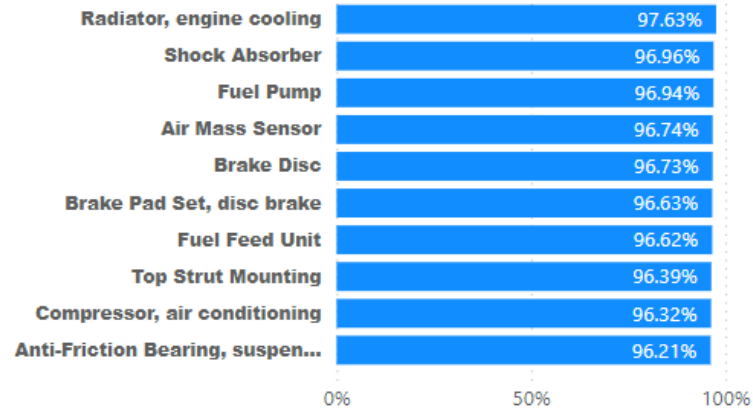
July

Total numbers of OE for MERCEDES-BENZ

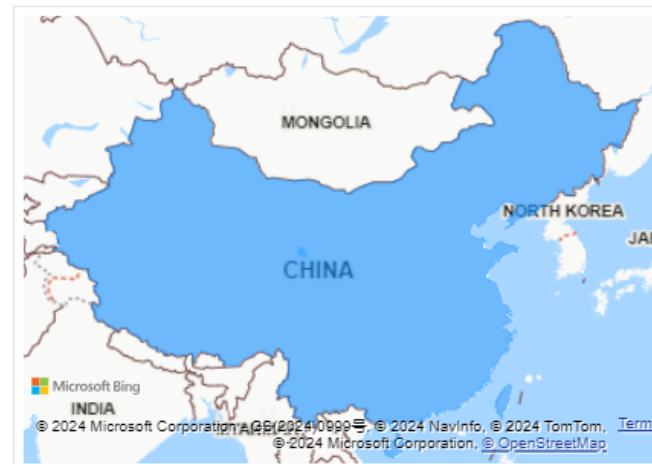
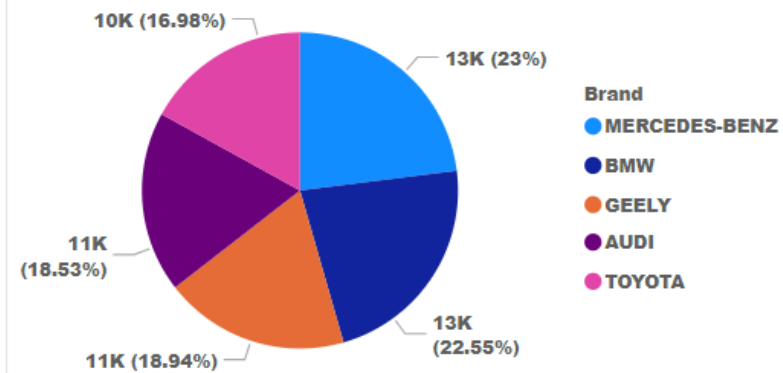
13K



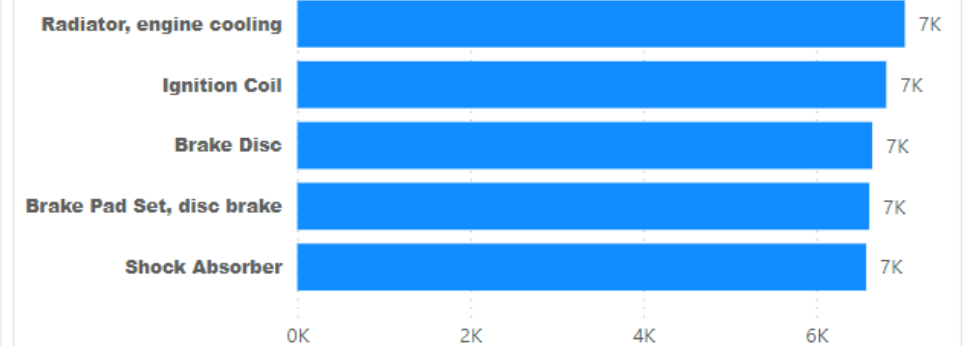
Top 10 Generic Articles by Coverage



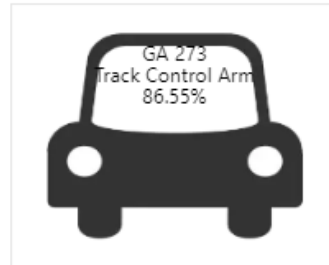
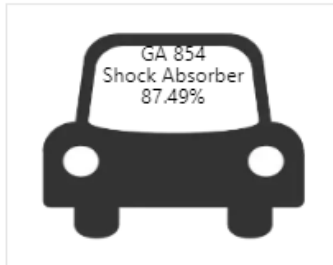
Top 5 Vehicle Brands by Total Number OE



Top 5 Generic Articles by K-Types



OE Coverage by VIO



NUMBER of GA for
NEV

10

NUMBER of GA for
NEV & ICE

63

Aug-2024 Update

Based on 2023H2

NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
854	Shock Absorber	87.49%
286	Steering Gear	86.66%
273	Track Control Arm	86.55%
447	Compressors	85.46%
298	Wiper Blade	84.68%
424	Interior air Filter	83.77%
402	Pad (disc brake)	81.55%
82	Disc	81.27%
654	Wheel Bearing Kit	80.18%
448	Condenser	79.74%
1	Starter Battery	79.08%
78	Caliper cylinder (housing)	78.23%
83	Brake hose	78.09%
508	Radiator Fan Complete	76.20%
793	Electric Motor Blower	75.91%
412	Sensor, wheel speed	74.50%
3229	Link,(Rod/Strut) stabilizer	73.71%
13	Drive Shaft	68.45%
1561	Regulator,window	67.33%

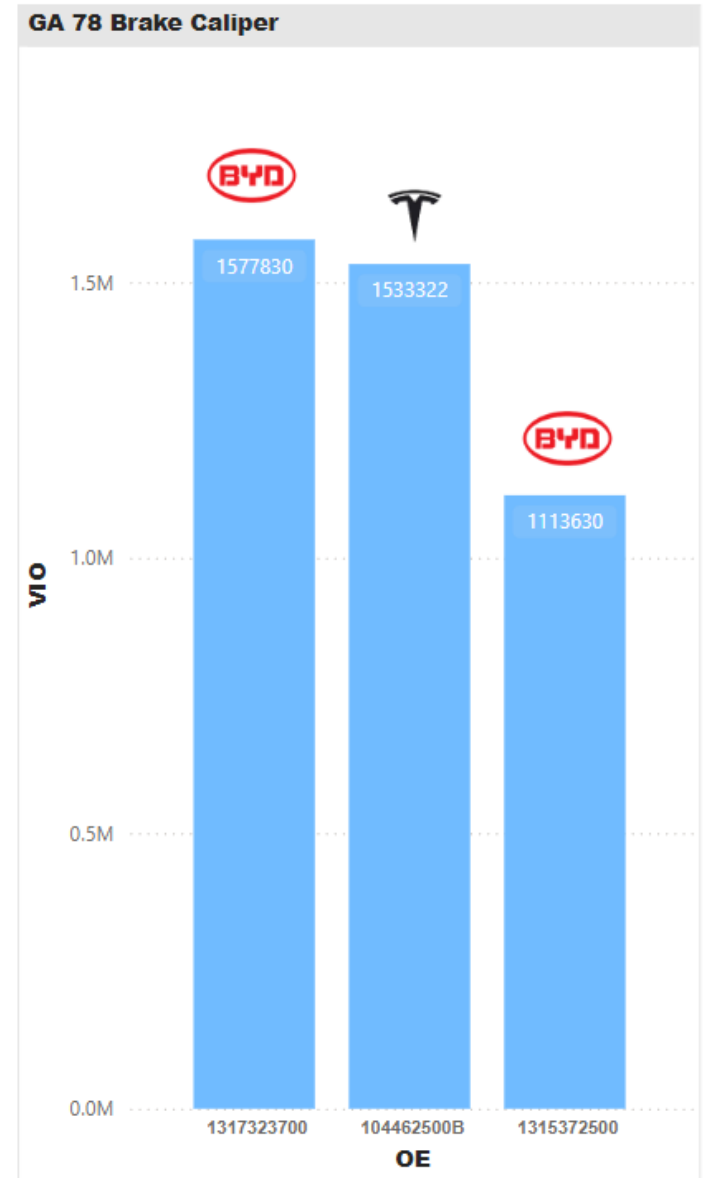
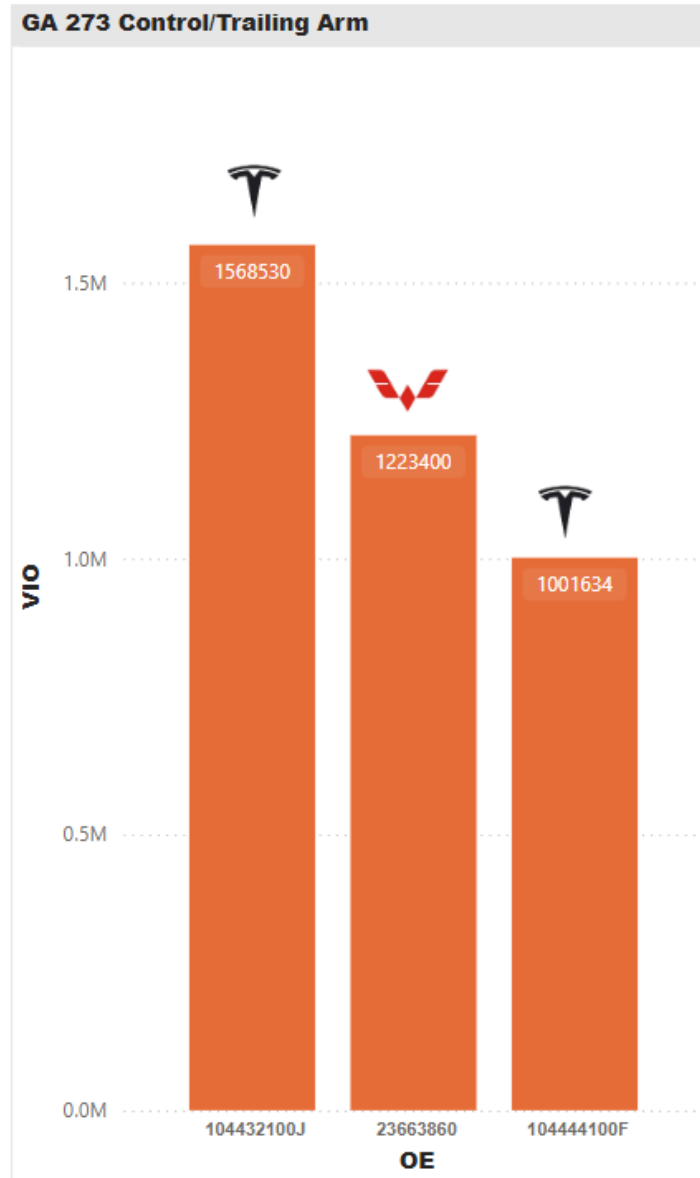
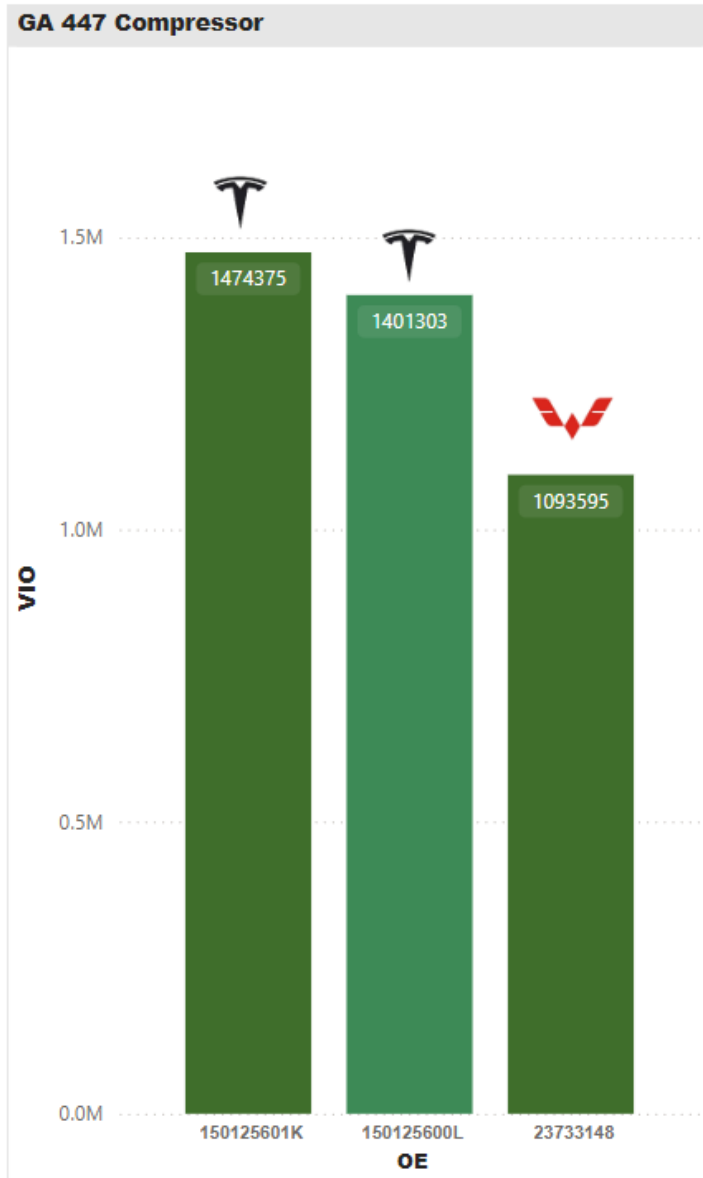
NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
471	Evaporators	66.23%
219	Gas spring boot-/cargo area	66.17%
467	Heat Exchanger, interior heating	64.28%
1351	Additional Water Pump	64.27%
5031	Radiator, Drive Battery	64.24%
1211	Steering Column	63.71%
1180	Suspension Strut Support Mounting	62.48%
397	Expansion Tank, coolant	61.62%
1182	Rubber Buffer, suspension	56.59%
3365	Cover/Rubber Boot, shock absorber	55.72%
247	Mounting, engine	54.19%
914	Tie Rod End	53.71%
183	Expansion Valve, air conditioning	53.22%
1626	Friction Bearing	52.08%
2232	Wheel Sensor,tyre pressure control system	48.71%
258	Brake Master Cylinder	39.33%
200	Electro Motor, window regulator	39.04%
8558	Battery Pack/48 V Battery	34.49%
2462	Ball Joint,(Support-/Controlarm Link)	31.83%

NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
51	Axial Joint (steering)	29.52%
331	Bushing, stabilizer	29.13%
5761	Charge Cable, electric vehicle	28.56%
5314	Screw Set, brake disc	28.21%
60573	Electromotor	27.90%
60506	Inverter Converter	27.14%
514	Gas spring engine flap	24.68%
191	Bellows (steering)	23.94%
60172	Charger, Traction battery	23.48%
123	Drum	21.37%
70	Shoe (drum brake)	20.39%
851	Receiver Driers	20.03%
251	Control Arm-/Trailing Arm Bush	19.08%
301	Wiper Arm,windscreen washer	19.06%
655	Wheel Bearing	17.59%
124	Primary handbrake cable	17.52%
60173	Control Unit, battery management	16.91%
919	Dust Cover Kit, shock absorber	13.80%
299	Wiper Blade Rubber	11.67%

Top 3 Coverage of OE by VIO



PADS NEV Dashboard

**K-TYPES Researched
YTD 2024**

666

**OE NOs Researched
YTD 2024**

20,787

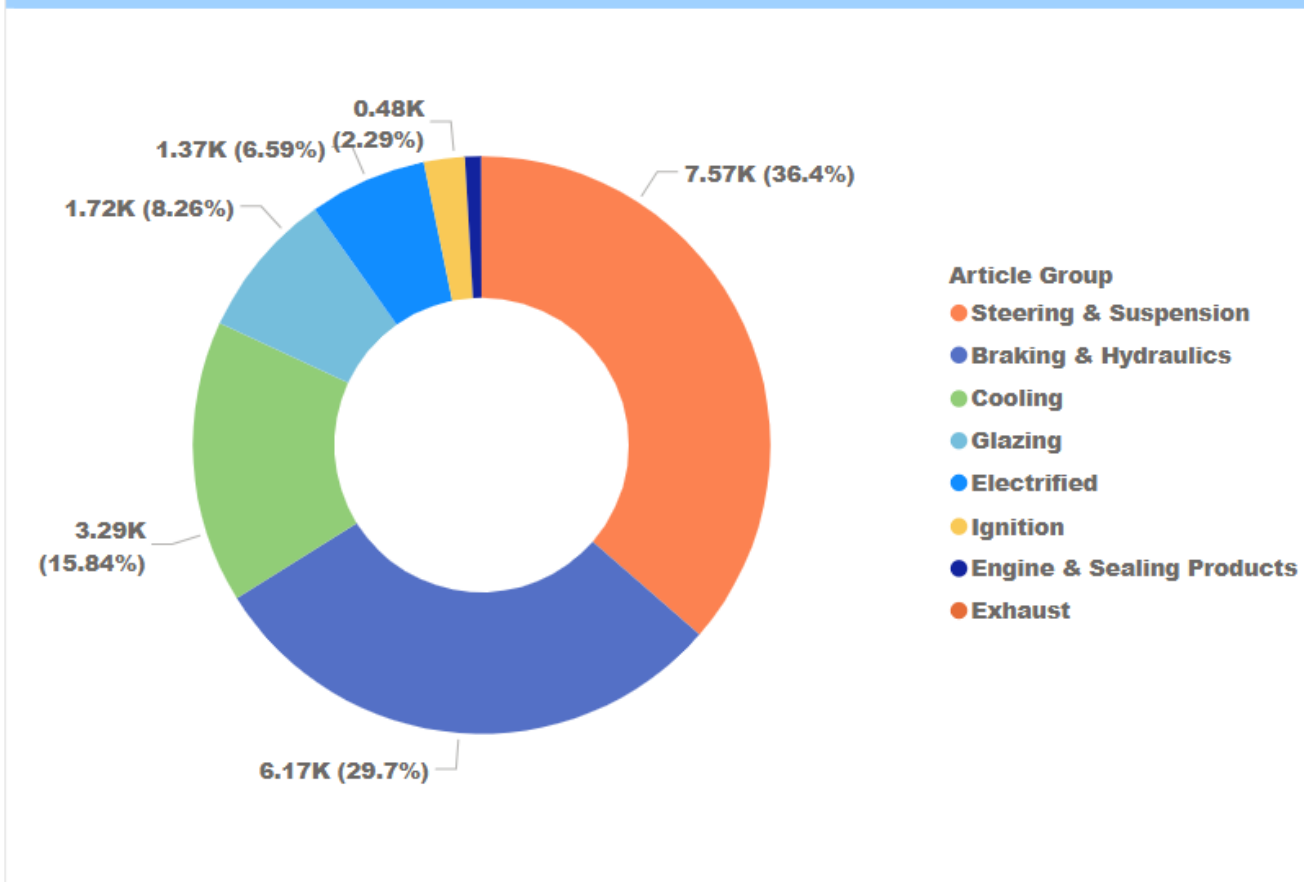
**GA Researched YTD
2024**

107

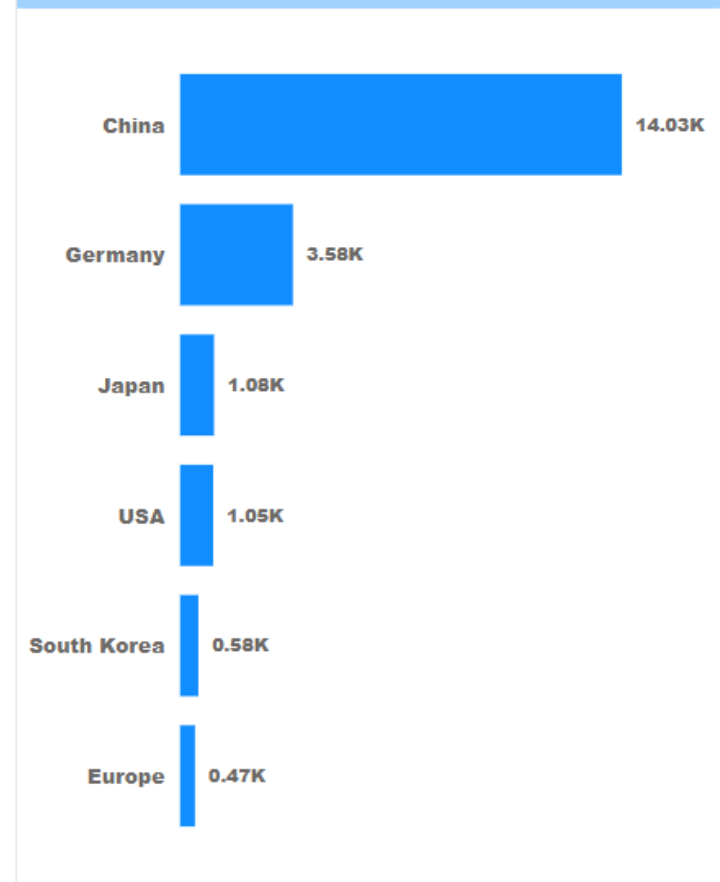
**Vehicle Brands Covered
YTD 2024**

108

Total Group by Number of OE



Total Brand Series by Number of OE



03

Company News

- Highlights of TecAlliance China participation in Auto parts ecology conference of qpzone
- TecAlliance China celebrates the relocation and official opening of new Shanghai office
- TecAlliance China Customer Training Workshop – Wenzhou
- TecAlliance Expands Global Footprint, Strengthens Regional Focus
- 2024 China Marketing Communication Roadmap



Highlights of TecAlliance China participation in Auto parts ecology conference of qpzone

- **Guangzhou, China 26th July 2024** - Mrs. Vivi Liu, sales leader of TecAlliance China, was invited to give a speech during the conference. she said that correct data analysis can not only help companies effectively develop business in China to improve product coverage and market share, help manage and expand overseas business, but also help companies make more informed decisions when building warehouses and inventory management overseas, thereby achieving cost reduction and efficiency increased. As a globally renowned data service provider, TecAlliance covers global models with unified standards, and has significant advantages in OE data, real-time data processing, easy to use return claims, and repair and maintenance data, providing one-stop solutions for enterprises to meet the increasingly complex challenges of cross-border sales.



TecAlliance China celebrates the relocation and official opening of new Shanghai office



- **Shanghai, China 20th August 2024 – TecAlliance China** held a memorable ceremony in celebration of the relocation and official opening of new Shanghai office. The celebration began with a heartfelt speech by our Executive Vice President (EVP) China, Mrs. Iris Huang, who expressed her sincere gratitude to the relocation project team for their hard work and dedication. She also thanked all employees for their support and cooperation during the move. Iris emphasized the importance of utilizing our new office space to enhance internal and cross-functional communication and collaboration, expressing her confidence that this would lead to achieving even higher performance goals in the future. We will strive to build a brighter and better future with our clients together!



TecAlliance China Customer Training Workshop - Wenzhou



As a series of training activities, in the next training workshops, we will share more hot topics and market situation and continue to bring customers better and more professional trainings and services.

Wenzhou, China August 21st, 2024 - TecAlliance China held a customer training workshop at the Shangri-La hotel in Wenzhou, 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.

TecAlliance Expands Global Footprint, Strengthens Regional Focus



Ismaning, Germany, 29 August 2024 – TecAlliance, the leading expert for data management and processes in the automotive aftermarket, is taking significant steps to strengthen its global presence. To better support its expanding global customer base, the data expert has reorganised its commercial structure into four main regions: the Americas, Asia Pacific, China, and EMEA. This strategic alignment allows TecAlliance to effectively support business growth outside Europe.

Building on years of consistent growth and acknowledging growing demand from customers and shareholders for enhanced support outside of Europe, TecAlliance has significantly invested in the development of its data solutions on a global scale. This expansion has resulted in the establishment of new offices dedicated to providing global product and data support, as well as commercial support, across key regions around the world.

To further drive its global strategy, TecAlliance has aligned its commercial organisation into four main regions, each led by an Executive Vice President: Frank Nieuwenhuys for EMEA, David Williams for the Americas, Matthias Moritz for Asia Pacific, and Iris Huang for China. The transition is expected to be fully completed by 1 January 2025.

Reflecting on TecAlliance's global realignment, CEO Peter van der Galiën commented: "TecAlliance has done really well over the past years. While the growth mostly came out of Europe, we have now reached a maturity level in the Americas, China, and Asia Pacific that we need to capitalise on supporting our customers and shareholders in these regions with the best possible automotive data products and solutions."

David Winter, Executive Vice President Sales New Markets, added: "TecAlliance works from a global strategy, but we need to plan regionally and execute these plans locally. The organisational adaptation allows us to do just that. At the same time, we need to make sure that we keep providing the best automotive data and process solutions to our customers and partners in Europe."

This strategic move is designed to accelerate the development of TecAlliance's flagship products, TecDoc and TecCom, and explore new opportunities in the global automotive aftermarket. Customers and shareholders can expect enhanced support from a robust global company structure. Additionally, TecAlliance is exploring opportunities to expand its TecRMI offerings with repair and maintenance information in markets outside of Europe.

New Leadership Appointment to Drive Success in China

Iris Huang has been promoted to Executive Vice President Commercial for China. With five years at TecAlliance and nearly seven years of experience at ZF, she has played a critical role in supporting the Chinese automotive aftermarket. "With the strong development of the Chinese automotive industry, it is important that TecAlliance has a focus on the Chinese automotive aftermarket, which we are supporting through our offices in Shanghai and Hong Kong. While we have seen good growth in recent years, we are convinced that with the right products and services, we can further grow our business with both our existing shareholders and customers, but also with new and innovative initiatives," Iris Huang stated.

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

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THANK YOU!



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