

# TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version August 2025

## 01 Market Outlook

- China Mainland
- China Hong Kong
- China Taiwan

## 02 TecAlliance Data

- OES Data Overview

## 03 Company News

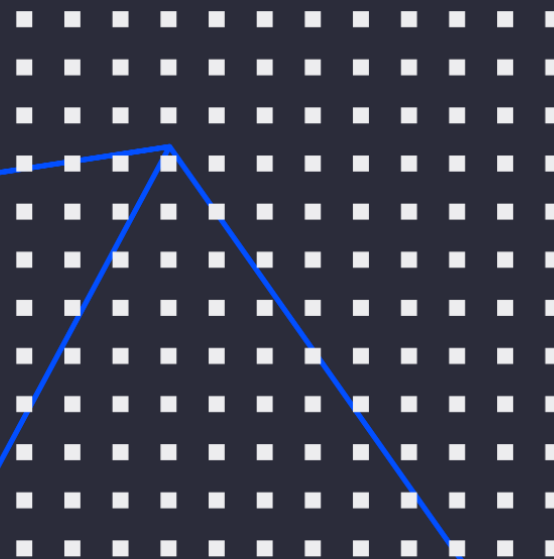
- 2025 China Marketing Communication Roadmap



# 01

## Market Outlook

China Mainland  
China Hong Kong  
China Taiwan



# China Mainland Highlight Vehicle News

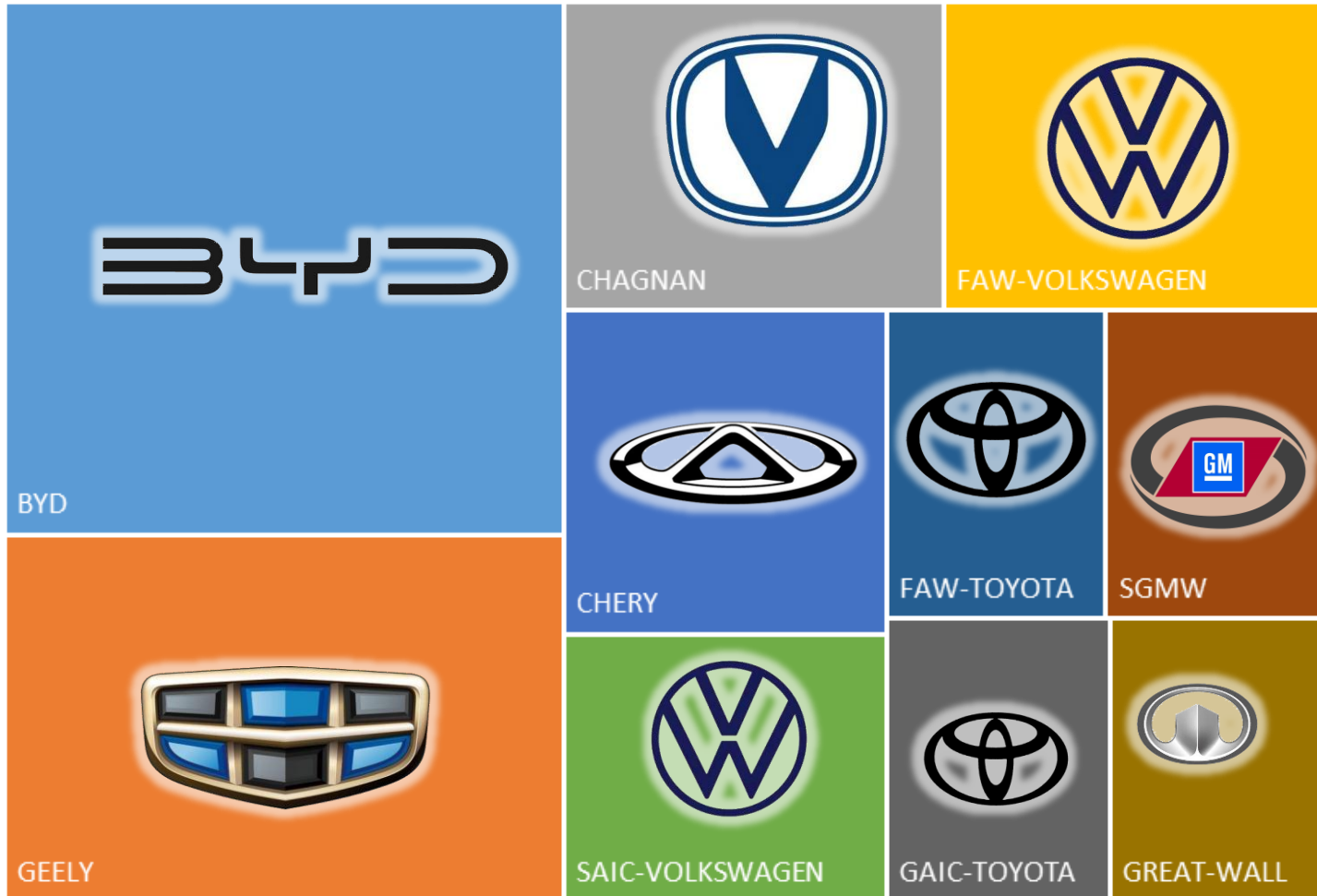
Afterwards, autonomous taxis from China will be available in Europe as Momenta deepens its collaboration with Uber.



- At the 2025 IAA Mobility International Auto Show in Germany, Momenta announced the latest developments in the European market. Momenta will continue to deepen its cooperation with Uber, and the two parties plan to launch commercial operations of L4 autonomous Robotaxis in Munich in 2026, which will become a key starting point for Momenta's journey towards scaling Robotaxi deployment in the European market.
- On the eve of the IAA, Momenta has further advanced its strategic layout by reaching a strategic cooperation with Valeo, a global leader in the field of advanced driver-assistance systems (ADAS). Both parties will establish a comprehensive and long-term partnership in the Chinese and global markets to jointly develop advanced mid-to-high-end combined driver assistance systems and autonomous driving products, systems, and solutions.
- In addition, the overseas version of the Zhiji L6 IM5 and LS6 IM6 were officially launched in the UK recently. Both new vehicles are equipped with the Momenta Flywheel large model assisted driving system. The Momenta Flywheel large model is a reinforcement learning large model that achieves mass production on an end-to-end basis, using a 'no-map end-to-end' approach, meaning it does not rely on high-definition maps and can be rapidly deployed in urban roads, highways, parking, and other scenarios around the world. This is also the core of Momenta's 'one flywheel, two legs' strategy, which is data-driven and facilitates the mutual cooperation between intelligent assisted driving and autonomous driving Robotaxi, continuously evolving.

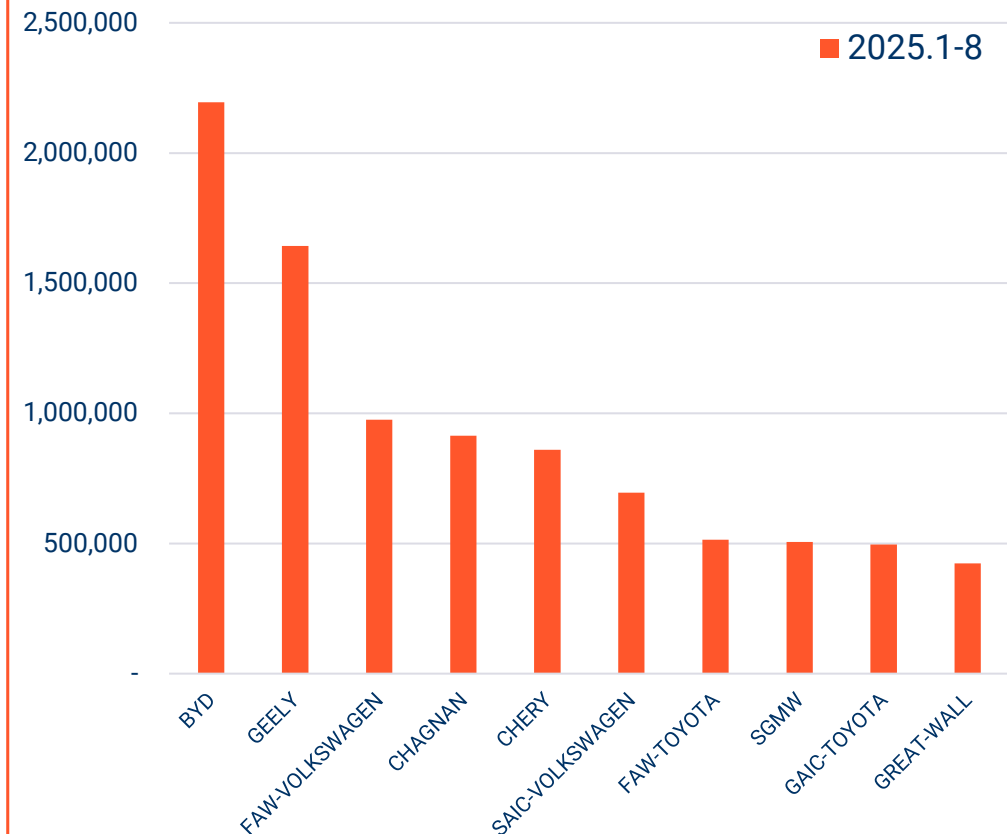
# China Mainland Highlight Vehicle News

## Top 10 manufacturer sales rankings in August 2025



## Sales comparison

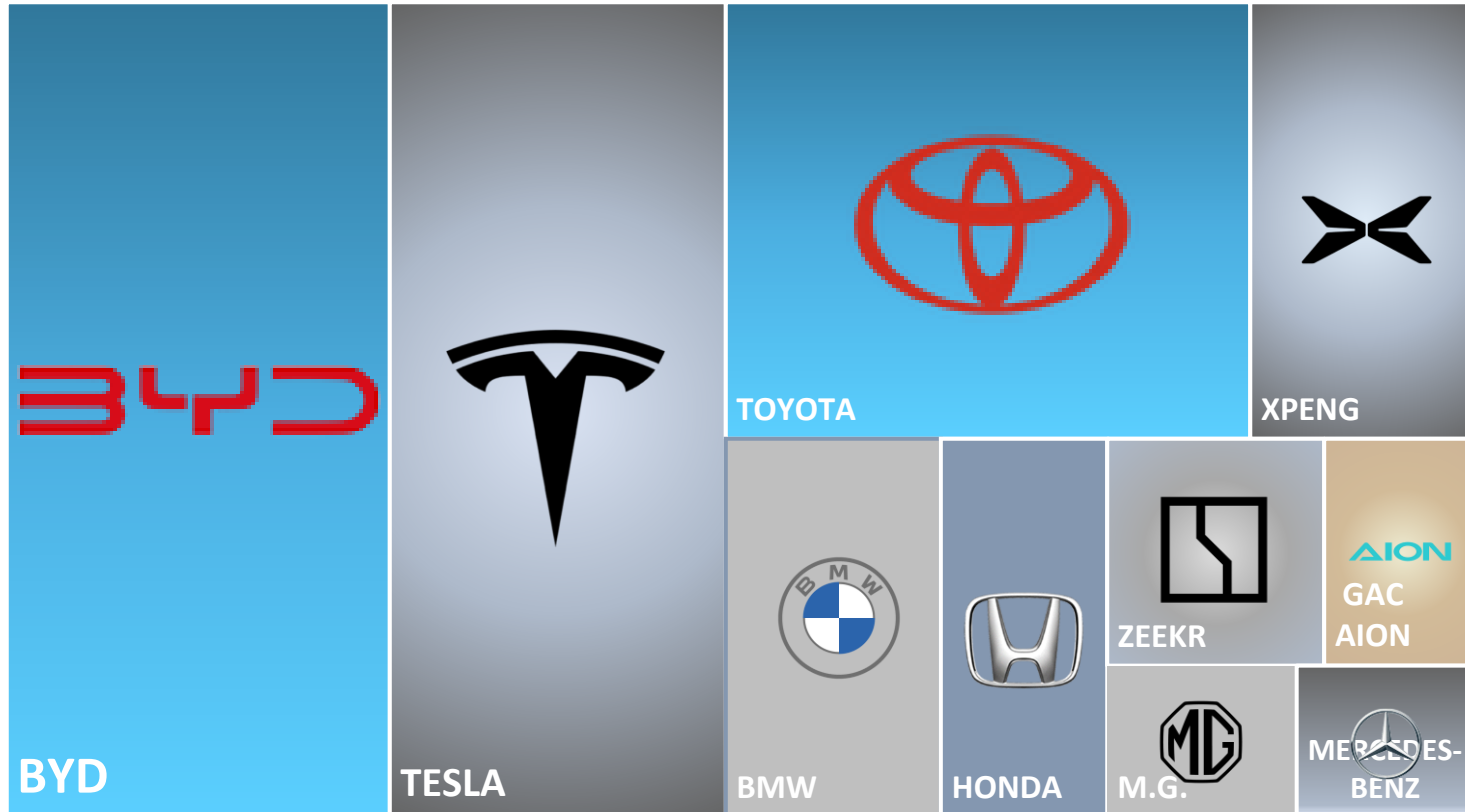
From January to August, BYD's sales are ahead of other brands.



# Hong Kong Highlight Vehicle News

## Hong Kong June 2025 Vehicle News

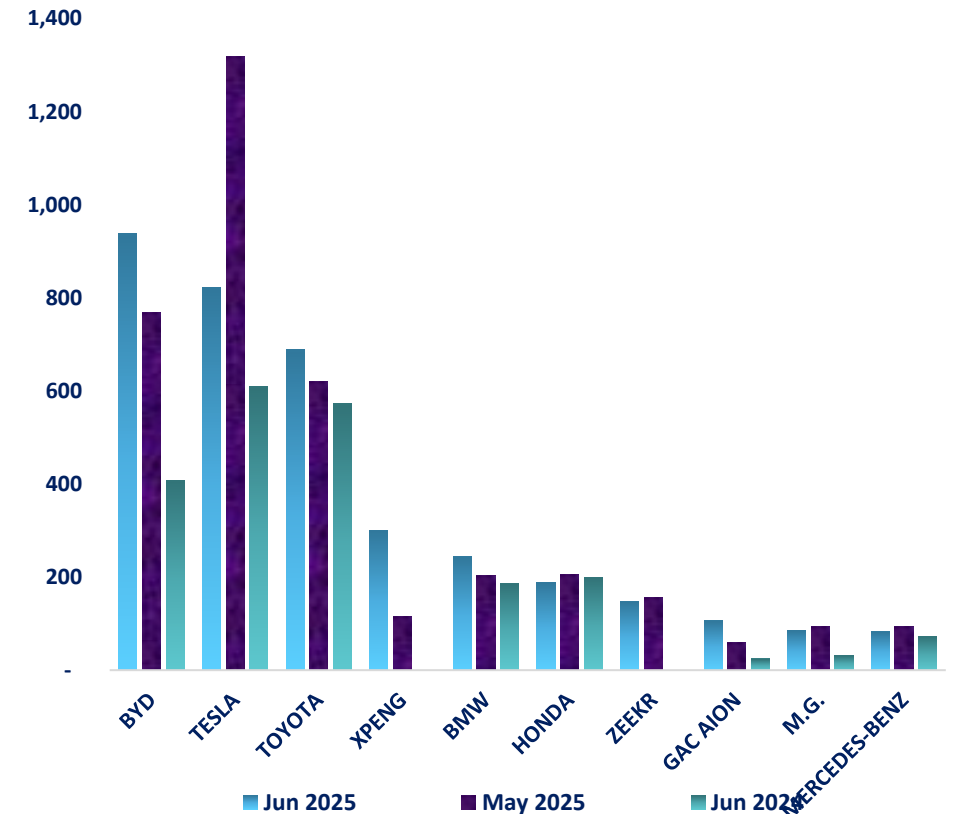
Hong Kong's passenger car sales in June 2025 were 4,393 units, down from 4,401 units in May 2025, a month-on-month decline of 0.2%. BYD sold 938 units, reclaiming its position as the most popular car brand in Hong Kong. TESLA ranked second with sales of 822 units, down 37.7% month-on-month; Toyota's sales increased by 10.8% month-on-month, placing it in third; XPENG's sales surged by 159.5% month-on-month, securing fourth place; BMW ranked fifth with 244 units sold. Overall, the market share of new energy vehicles continues to expand in Hong Kong, and the penetration rate of pure electric vehicles from the mainland in the Hong Kong market has further increased.



## Sales Comparison

Hong Kong's automotive market is becoming electrified

In June, the top-selling car in Hong Kong was seized by BYD, with TESLA ranking second with a monthly sales figure of 822 units, and Toyota coming in third with 688 units. XPENG ranked fourth with 301 units sold, followed by BMW in fifth place with 244 units, and Honda in sixth place with 189 units. The seventh place in sales is taken by ZEEKR, which sold 148 units. GAC AION, M.G., and Mercedes-Benz sold 106 units, 86 units, and 83 units respectively, ranking eighth, ninth, and tenth.



# Taiwan Highlight Vehicle News

## Taiwan Auto Sales Report for August 2025

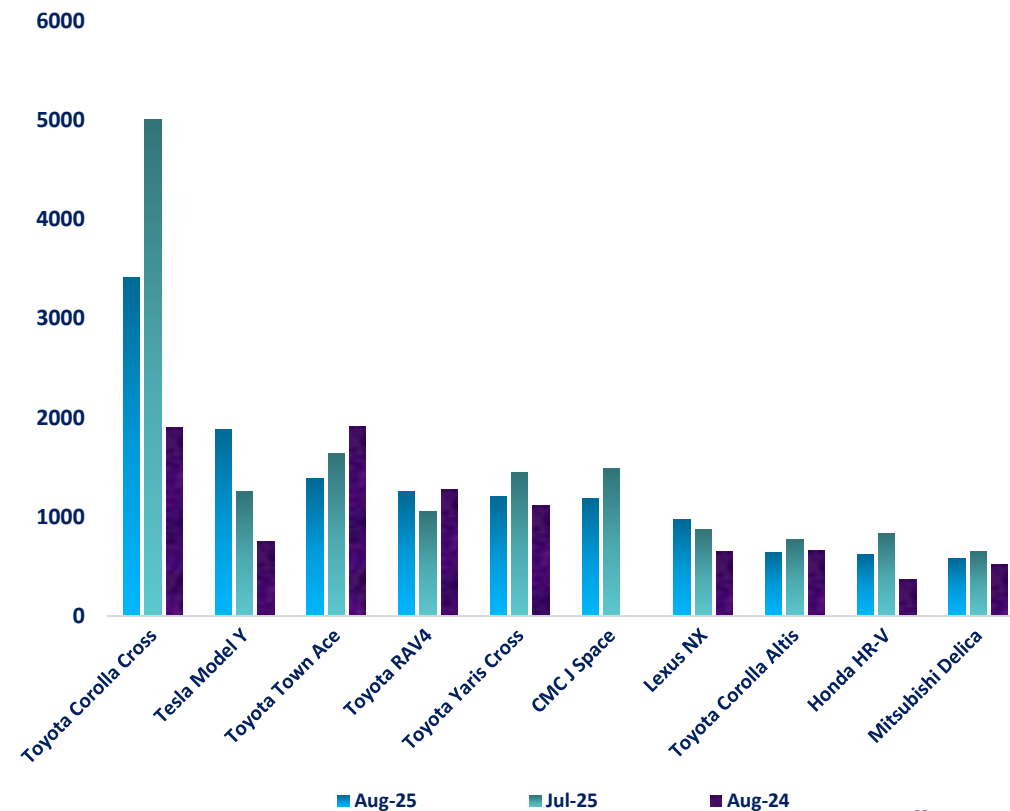


Due to a strong wait-and-see atmosphere in the market, the new car sales data for August 2025 amounted to only 29,460 vehicles, failing to surpass the 30,000-unit threshold, representing a 17% decline compared to July. The biggest turning point in market buying momentum in August came from the message released by the Finance Committee of the Legislative Yuan on August 21, after negotiations between the ruling and opposition parties confirmed the extension of the old-for-new vehicle tax reduction policy, which ends on January 7, 2026, offering a reduction of 50,000 NTD on commodity tax. In addition, the purchase of passenger cars with engine capacities below 2,000 c.c. would also be eligible for a 50,000 NTD commodity tax reduction, with both subsidy measures planned to be implemented until the end of 2030. Ultimately, the Legislative Yuan passed the bill on August 29 in a third reading, to be announced for implementation by the regional leader of Taiwan, although the execution date for the subsidies remains unspecified. It is easy to imagine that when consumers first heard about the policy subsidies, they would inevitably postpone their vehicle purchases and deliveries, hoping to wait for the subsidy policy to become clearer before making a purchase, which directly impacted the new car sales volume in August. Although the number of new car registrations by August 20 was approximately 18,700 vehicles, under normal circumstances, the registrations in the last 10 days would roughly equal the accumulated registrations of the previous 20 days. However, in August, only about 10,000 vehicles were added at the end, clearly indicating the significant impact of policy on the new car market.

## ■ Sale Comparison

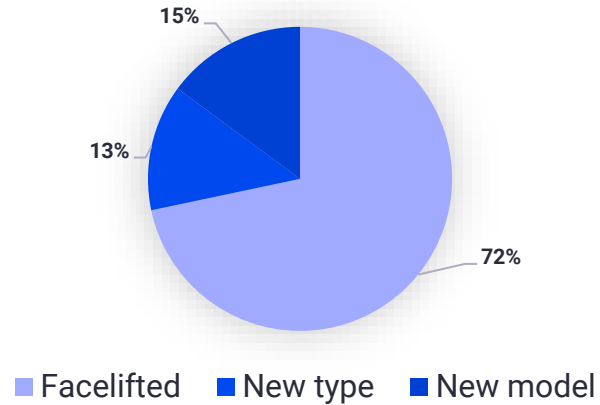
The new car market is greatly affected by policy changes.

Toyota Corolla Cross and Tesla Model Y took the first and second places in the market, respectively, with 3,417 and 1,879 units sold. Toyota Town Ace saw a 15.7% drop in sales compared to July, ranking third with 1,382 units sold. Toyota RAV4 experienced an 18.2% increase in sales compared to July, ranking fourth with 1,251 units sold. Toyota Yaris Cross ranked fifth with 1,203 units sold, while the CMC J Space ranked sixth with 1,181 units sold. Finally, Lexus NX, Toyota Corolla Altis, Honda HR-V, and Mitsubishi Delica ranked seventh, eighth, ninth, and tenth, respectively, with sales of 970, 639, 625, and 581 units.

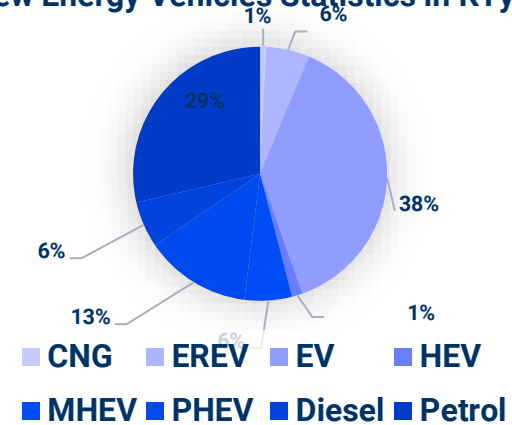


# China JAN-AUG New Vehicle Analysis

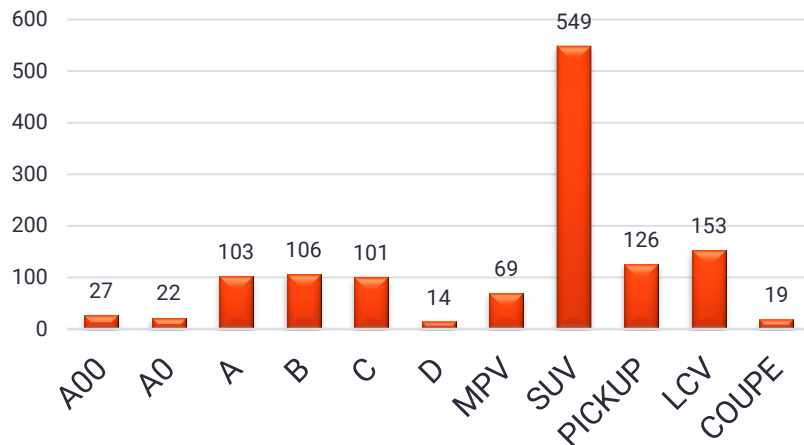
New vehicle statistics in KType



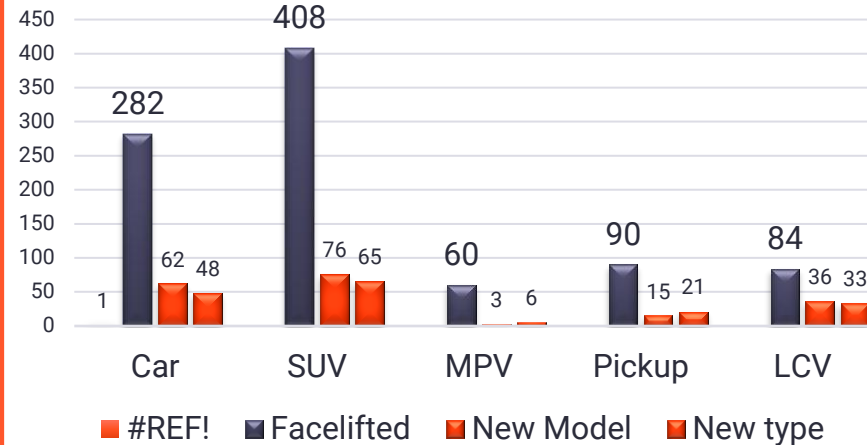
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to August 2025**, the total coverage of **K-Type** was **1289**, of which **365** 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	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total
1	BYD	70	31	QIYUAN	12	61	VGX	6	91	YE	4	121	VICTORY	2
2	JETOUR	41	32	NAC IVECO (NAVECO)	11	62	BAW	6	92	LOTUS	4	122	SWM MOTORS	2
3	CHERY	39	33	XPENG	11	63	JEEP	6	93	LEXUS	4	123	SUBARU	2
4	MERCEDES-BENZ	39	34	NEW BAOJUN	11	64	AUDI (SAIC)	6	94	DONGFENG XIAOKANG	3	124	FANGCHENGBAO	2
5	VW (FAW)	38	35	JINBEI	11	65	AUDI	6	95	TOYOTA	3	125	POLESTAR	2
6	CHANGAN	37	36	RADAR	11	66	BMW	6	96	YUFENG	3	126	RCEV	2
7	MAXUS	36	37	BESTUNE	10	67	VOYAH	6	97	CAVAN	3	127	ZD	2
8	CHANA	36	38	ISUZU (JIANGXI)	10	68	ISUZU (QINGLING)	6	98	VENUCIA	3	128	INFINITI (DFAC)	2
9	HONGQI	35	39	GAC NE	10	69	HYPER	6	99	MAEXTRO	3	129	FIREFLY	2
10	DONGFENG (DFAC)	32	40	FORD (JMC)	10	70	LINCOLN (CHANGAN)	6	100	JAGUAR (CHERY)	3	130	FENGON	2
11	JAC	27	41	FARIZON AUTO	10	71	JMEV	6	101	JETTA	3	131	WEY	2
12	FENGXING	22	42	GALAXY	9	72	LIXIANG	6	102	ZEEKR	3	132	KTM	1
13	EXEED (CHERY)	22	43	TANK	9	73	KIA (DYK)	6	103	ORA	3	133	SMART	1
14	VW (SVW)	20	44	GAC	9	74	AITO	5	104	VOLVO	3	134	STELATO	1
15	SKYWORTH	19	45	NISSAN (DFAC)	9	75	SMART	5	105	M-HERO	3	135	LAMBORGHINI	1
16	er	18	46	ARCFOX	9	76	CADILLAC (SGM)	5	106	REFINE	3	136	LINGBOX	1
17	AUDI (FAW)	18	47	VOLVO ASIA	9	77	HONDA (DONGFENG)	5	107	MINI	3	137	ROLLS-ROYCE	1
18	DEEPAL	18	48	ROEWE (SAIC)	9	78	DENZA	5	108	AITO	3	138	MERCEDES-BENZ (FJDA)	1
19	LEAPMOTOR	17	49	LYNK & CO	9	79	LANDIAN	5	109	CITROËN (DF-PSA)	3	139	BENTLEY	1
20	FOTON	16	50	TESLA	9	80	GREAT WALL	5	110	212	2	140	MAPLE	1
21	AEOLUS	16	51	BUICK (SGM)	8	81	R AUTO	5	111	LEVC	2	141	FERRARI	1
22	WULING (SGMW)	15	52	MG (SAIC)	8	82	MAZDA (CHANGAN)	5	112	NAMMI	2	142	MASERATI	1
23	JMC	15	53	IM MOTORS	8	83	i CAR	4	113	TOYOTA (FAW)	2	143	LIVAN AUTO	1
24	AVATR	15	54	LUXEED	8	84	BAIC-ORV	4	114	ONVO	2	144	HEDMOS	1
25	MERCEDES-BENZ (BBDC)	14	55	HONDA (GAC)	8	85	XIAOMI	4	115	YANGWANG	2	145	FORD (CHANGAN)	1
26	BMW (BRILLIANCE)	14	56	TOYOTA (GAC)	7	86	KARRY	4	116	BAIC	2	146	SUZUKI	1
27	COWIN	13	57	PORSCHE	7	87	GENESIS	4	117	JUNEYAO AUTO	2	147	OSHAN	1
28	GEELY	13	58	LINXYS	7	88	NISSAN (ZHENGZHOU)	4	118	VW (ANHUI)	2	148	ALFA ROMEO	1
29	SRM (BRILLIANCE)	12	59	NIO	7	89	PEUGEOT (DF-PSA)	4	119	VW	2	149	LETIN	1
30	HAVAL	12	60	LAND ROVER	7	90	JAC EV	4	120	NEOMOR	2	149		

## Remarks:

All statistical data is based on K-Type. From **January to August 2025**, the total coverage of **K-Type** was **1289**, of which **365** were **New K-Type**.

# China VIO Report

## CHINA VIO REPORT

VIO until 2024

China Mainland



VEHICLES IN OPERATION	VIO WITH KTYPE	KTYPE WITH VIO	VEHICLE BRANDS
320,141,504	320,124,015	10230	348

### 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

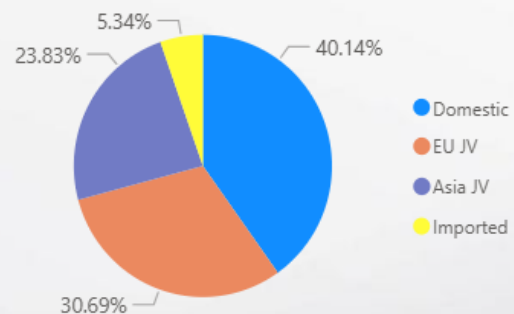
#### EU JOINT VENTURE CAR

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  
**128.5M**  
VIO COVERED



Coverage  
**99.98%**  
EU JV  
**98.2M**  
VIO COVERED



Coverage  
**99.95%**  
Asia JV  
**76.3M**  
VIO COVERED



Coverage  
**99.91%**  
Imported  
**17.1M**  
VIO COVERED

### TOP1 VEHICLE BASED ON VIO



VW (SVW)



LAVIDA

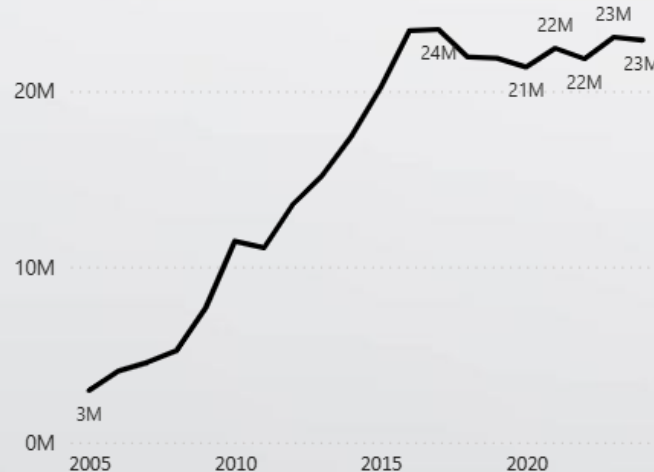
VIO OF TOP 1 VEHICLE

**1,811,613**

POPULATION SHARE

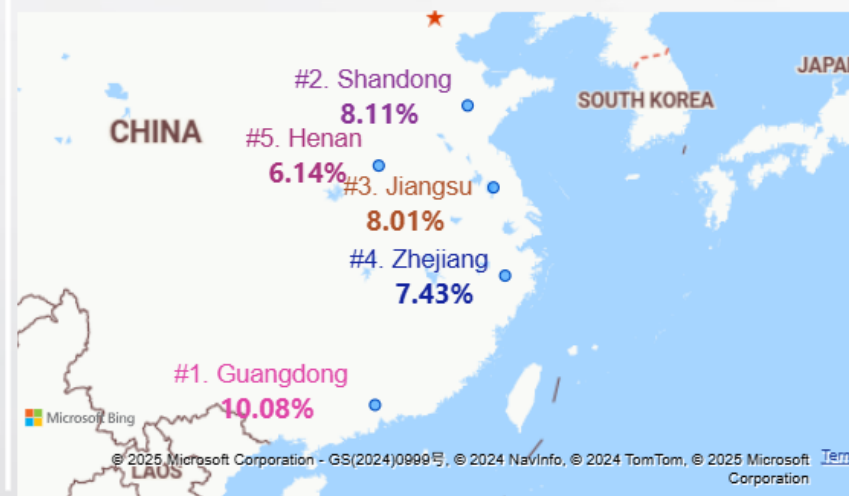
**0.57%**

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



### TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2024)



# 02

## TecAlliance Data OES Data Overview



# PV OE Data Research Dashboard

**K-Types of US Vehicle Brands Researched**

**814**

**Generic Articles of US Vehicle Brands Researched**

**230**

**OE Numbers of US Vehicle Brands Researched**

**54K**

**US Vehicle Brands Covered**

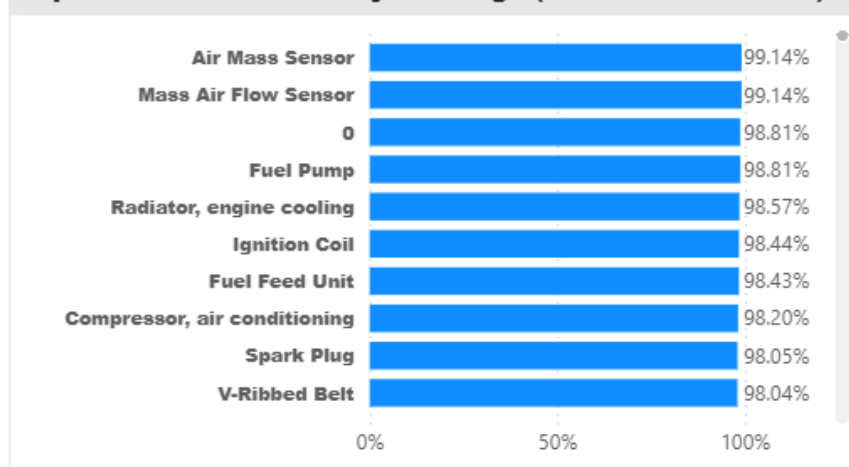
**26**



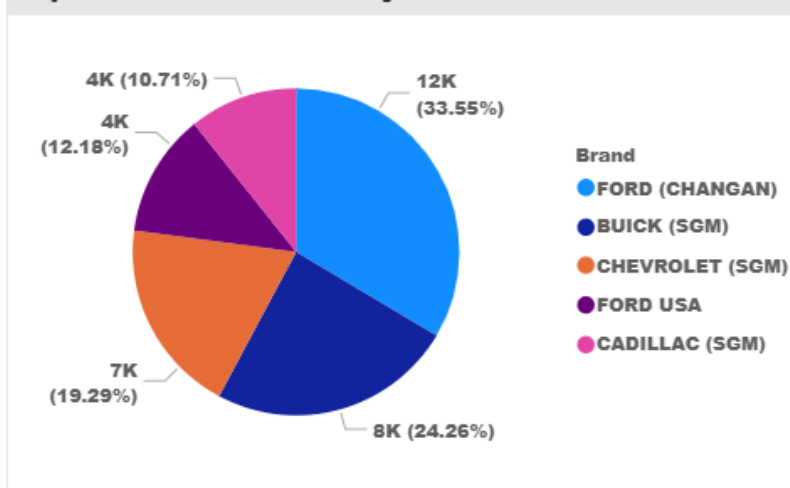
CHINA ▾

2025 ▾

## Top 10 Generic Articles by Coverage ( US Vehicle Brands )



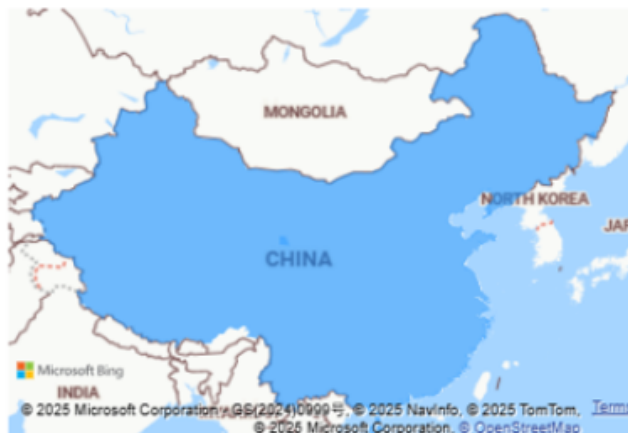
## Top 5 US Vehicle Brands by OE



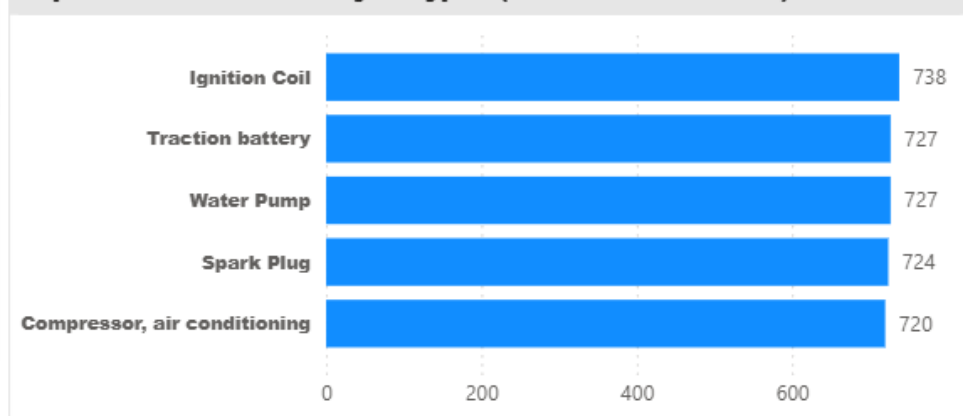
Aug ▾

## Total OE numbers of FORD(CHANGAN)

**12K**



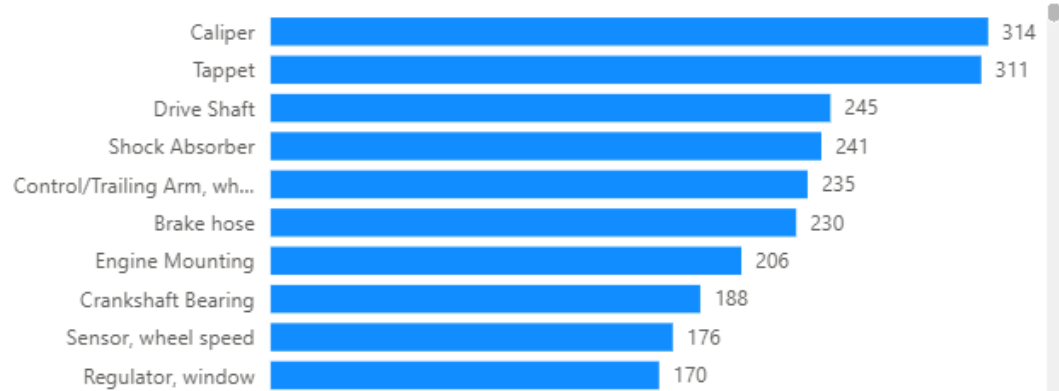
## Top 5 Generic Articles by K-Types ( US Vehicle Brands )



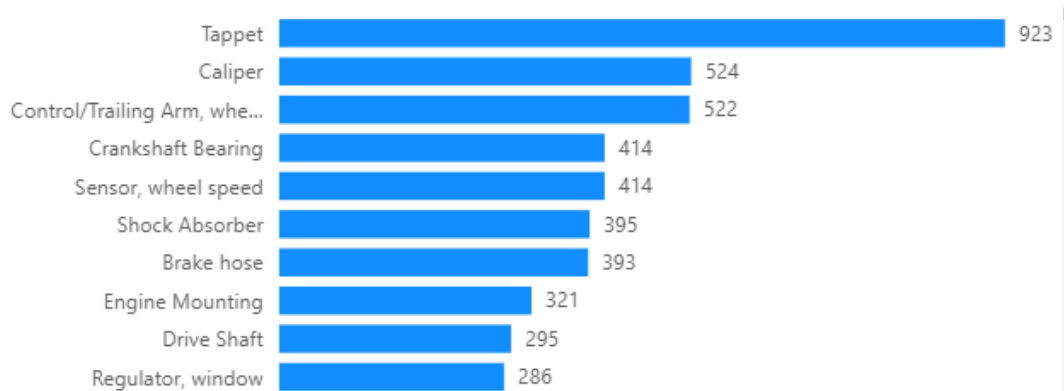
# New OE Part Number Databases for Chinese Brands in Mexico



## TOP 10 OE By Generic Articles



## TOP 10 Linkage By Generic Articles



Total Article Group

**195**

Total Linkage

**16K**

Total Brand

**16**

Total OE

**7952**

## Brand Details Dashboard

Brand	Total K-Type	Total Articlegroup	Total OE numbers
MG (SAIC)	13	150	1451
JAC	21	156	1360
BYD	14	122	1051
ROEWE (SAIC)	11	143	982
CHANGAN	7	135	875
BAIC-ORV	7	142	629
BEIJING	5	129	554
BAIC	5	128	540
SOL	3	114	446
CHANGHE	2	91	266
GREAT WALL	2	119	231
TANK	1	107	210
CHANA	1	93	162
ORA	1	44	121
JAC EV	2	38	77
MG (NANJING)	2	5	7
<b>Total</b>	<b>97</b>	<b>195</b>	<b>7952</b>

# 03

## Company News

- 2025 China Marketing Communication Roadmap



# 2025 China Marketing Communication Roadmap



**“Go to market”**

- Auto Maintenance and Repair (AMR) Conference (Beijing, March 30)
- China Data Supplier Conference (Shanghai, April 17)
- Taipei AMPA (Taiwan, April 23–26) Engaging with automotive specialists in Asia.
- CAPAS (Chengdu, May 22–26) Focusing on the growth of the Chinese aftermarket sector.
- Auto Aftermarket Guangzhou (August 27–29) Strengthening our footprint in the Asian automotive sector.
- International Auto and Motorcycle Expo (Wenzhou, September 4–6) Showcasing innovations for vehicles of all types.
- Automechanika Johannesburg (South Africa, October 28–30) Expanding our reach into the African market.
- AAPEX Show (November 4–6) A must-attend event for the global aftermarket community.
- Automechanika Shanghai (AMS, November 26–29) Connecting with leading players in the world’s largest automotive market.
- Automechanika Dubai (December 9–11) Closing the year with insights into Middle Eastern automotive trends.

more...

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# THANK YOU!



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