

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version December 2025

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- China Taiwan

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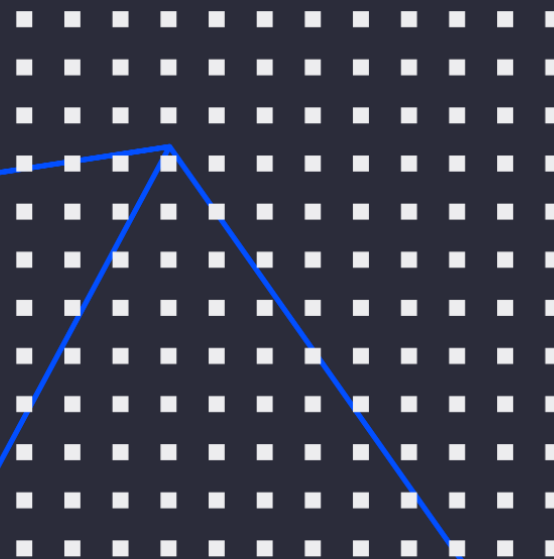
- Happy Chinese New Year 2026!



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



Based on the PPC platform and positioned against the BMW X7 and Mercedes-Benz GLS, the Audi Q9 will be introduced to the domestic market in early 2027.

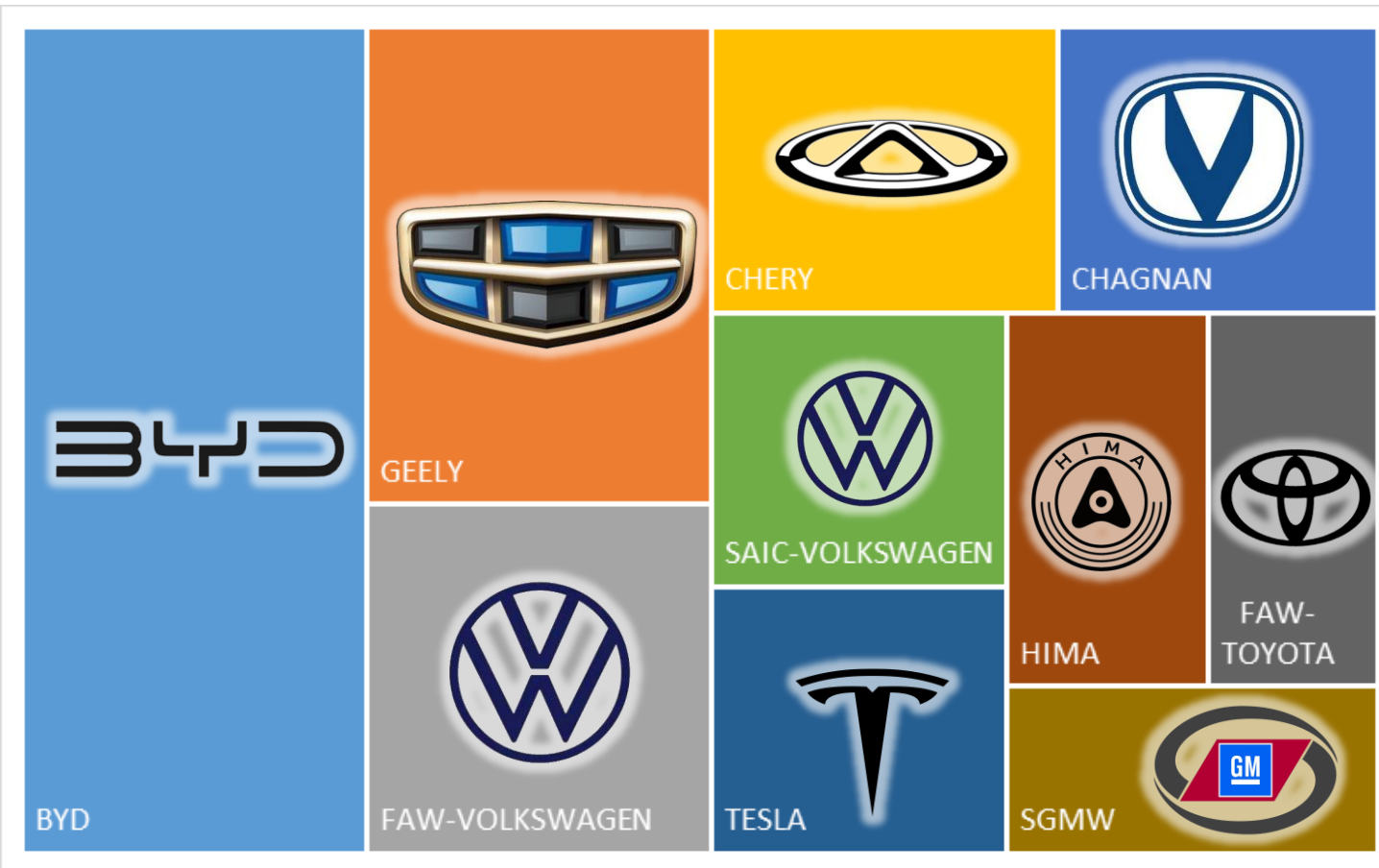


Guo Yongfeng, Executive Vice President of FAW Audi Sales Co., Ltd., stated that FAW Audi will introduce the full-size Audi SUV, the Audi Q9, in early 2027. The new model is built on the PPC platform, features the brand's family-style design, and will offer 6- and 7-seat configurations inside. In terms of powertrains, it will support various options including V6, V8, and plug-in hybrid. Additionally, derivative models such as the SQ9 and Q9 Horch version will be launched. It is reported that the new car is expected to be unveiled in 2026..

According to previously leaked spy photos, the Audi Q9 already has road-tested versions including the standard Q9, the SQ9 with quad exhausts, and the Horch version featuring a waterfall-style grille. The new car's exterior adopts the current Audi family design, with the iconic large front grille paired with split headlight units, giving the new car a very high level of recognition. In terms of power, the new car is expected to offer V6, V8, and plug-in hybrid variants, and there are also expected to be surprises in terms of intelligent driving features.

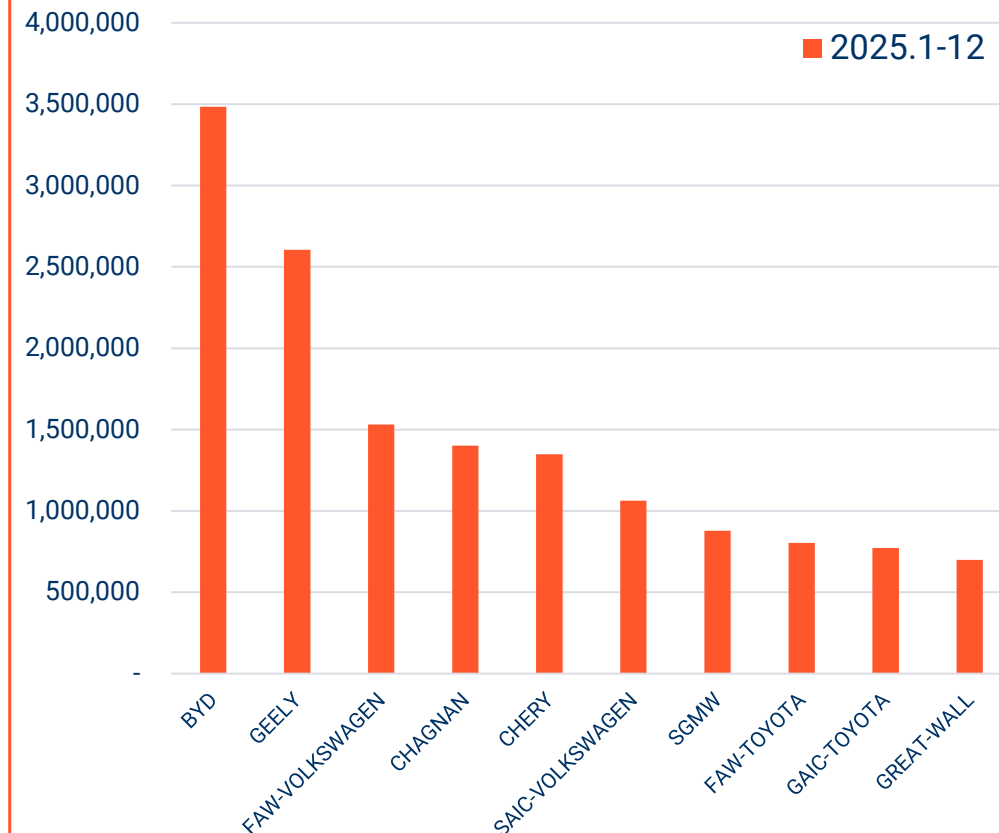
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in December 2025



Sales comparison

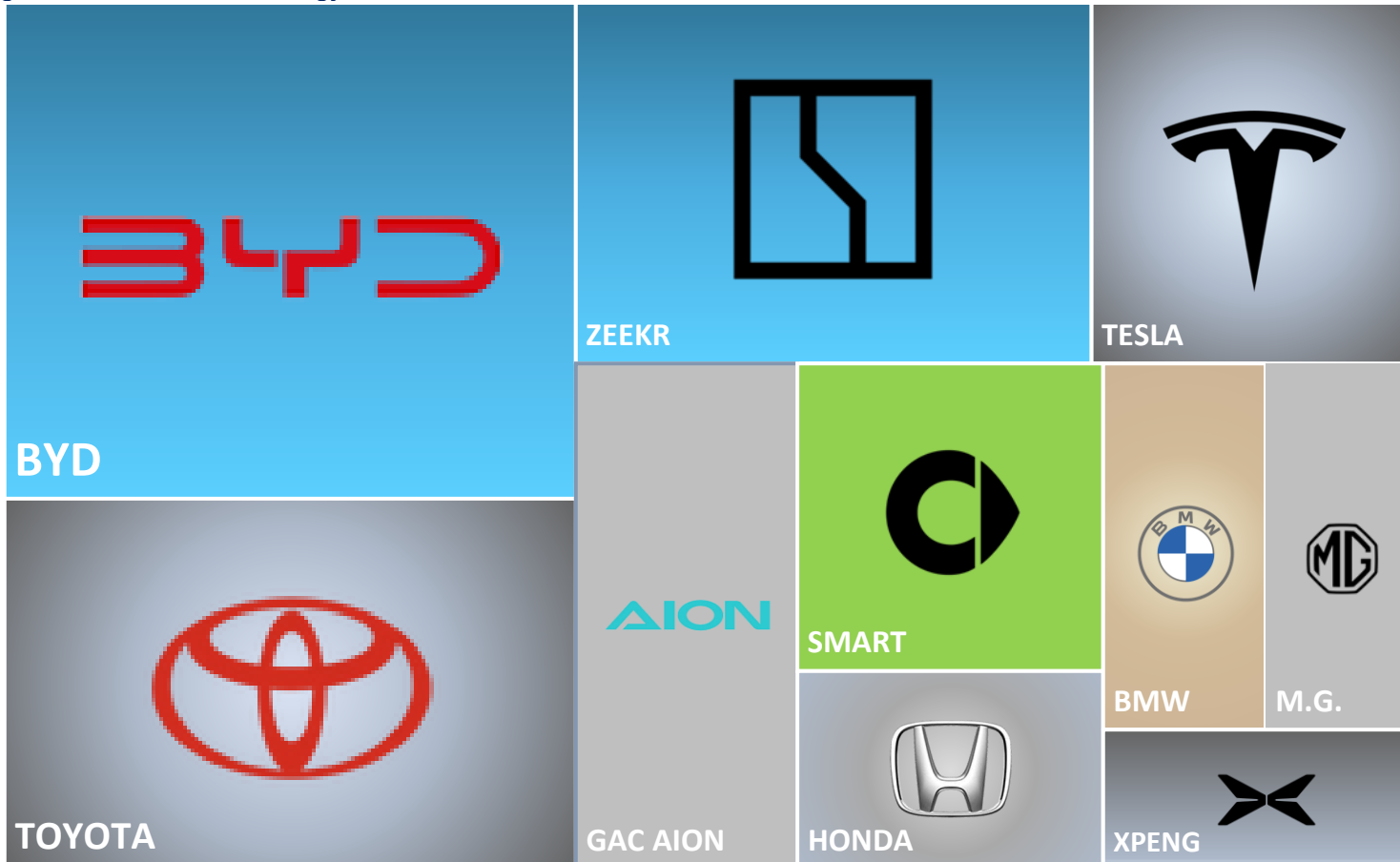
From January to December, BYD's sales are ahead of other brands.



Hong Kong Highlight Vehicle News

Hong Kong October 2025 Vehicle News

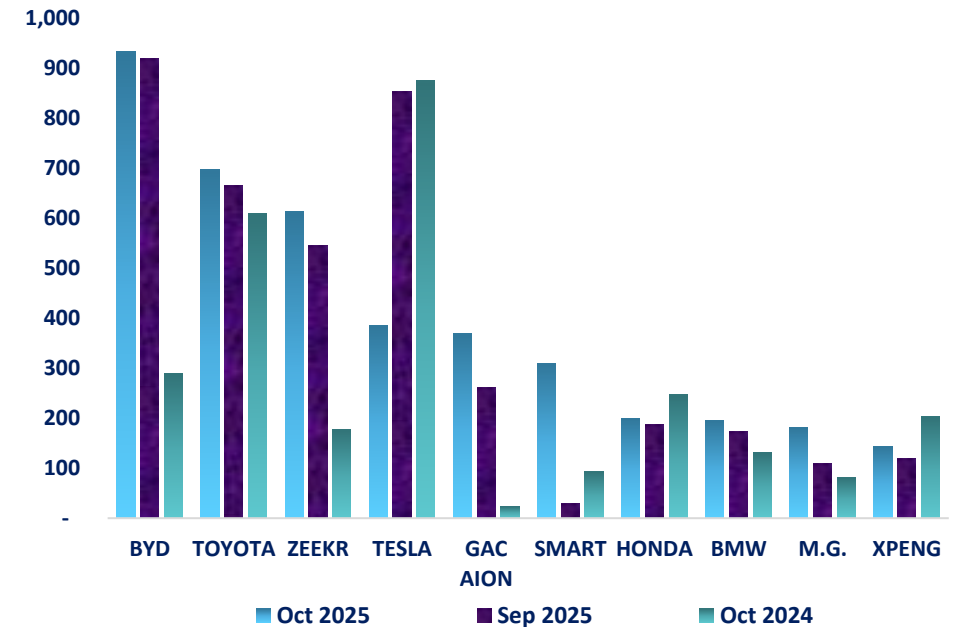
In October 2025, total vehicle sales in the Hong Kong automobile market reached 5,191 units, an increase of about 11% compared to September 2025 (4,678 units) and a significant year-on-year increase of 35.6% compared to October 2024 (3,829 units). New energy brands such as BYD and ZEEKR contributed the majority of the sales growth, while traditional fuel vehicle brands like Toyota and Honda showed moderate growth, indicating a continued optimization of the market structure. This growth reflects an accelerated shift from conventional fuel vehicles to new energy vehicles, with the penetration rate of new energy vehicles expected to exceed 70%, further consolidating Hong Kong's position as a leading global market for new energy vehicles.



■ Sales Comparison

Overall sales remain stable, with a strengthening trend led by new energy vehicles

BYD remained at the top with 934 units sold, holding a market share of about 23.2%, a slight month-on-month increase of 1.5% from September. Toyota sold 698 units, a 5% increase from September; although maintaining second place, its growth rate is lower than that of the new energy sector. ZEEKR sold 613 units, up 12.3% from September; as an emerging brand, its rapid rise reflects the Hong Kong market's preference for cost-effective new energy vehicles. TESLA sold 386 units, plunging 54.7% from September, with the sharp decline likely due to Model 3/Y's weakened competitiveness. GAC AION ranked fifth with 369 units sold, and SMART sold 310 units, a dramatic month-on-month surge of 969%, indicating the initial effectiveness of its new energy transformation. Other brands showed relatively small changes, with most experiencing year-on-year growth, albeit limited.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for November 2025



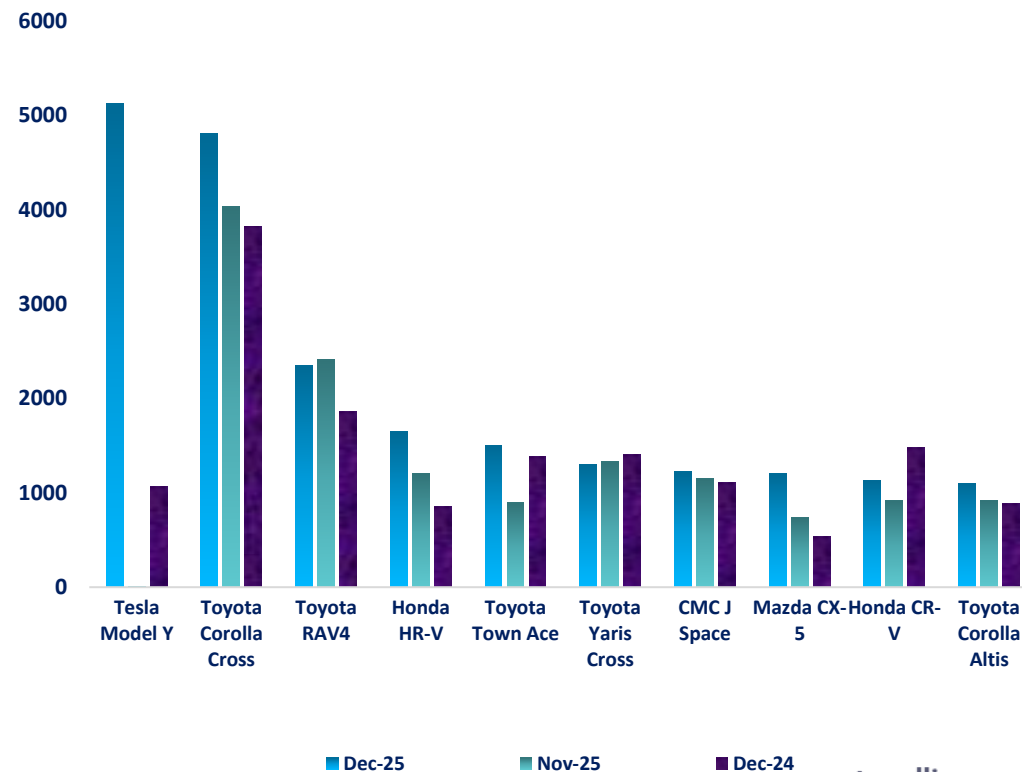
In December 2025, with various major brands ramping up their efforts, the total number of registrations for the month reached 47,303 units. This not only marked the first time in 2025 that the monthly figure surpassed 40,000 units, but it also represented nearly a 30% increase (29.7%) compared to November, and a growth of 14.5% compared to December 2024—truly a strong year-end surge.

The key point is that the performance in December helped prevent the total market for 2025 from falling far behind 2024. In total, the cumulative sales in Taiwan's new car market for 2025 reached 414,436 units. Compared to the 2024 annual cumulative sales, the decline was kept under 10%, at 9.5%. Excluding the impact of the Lunar New Year in late January 2025, which affected that month's sales, the lowest point for cumulative market performance was in July, at 234,450 units, which was only 84.3% of the cumulative sales from January to July 2024.

Sale Comparison

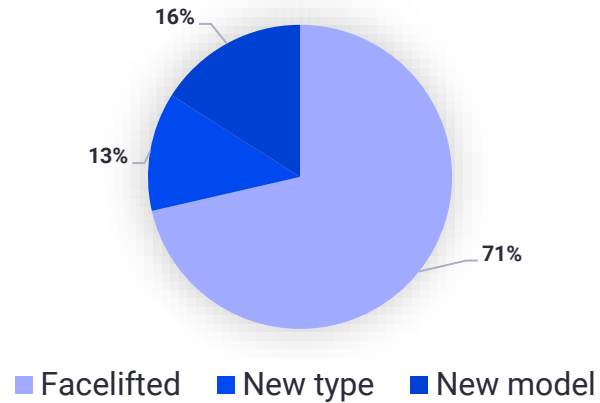
The fluctuations throughout the year have had a considerable impact on the market

Due to the limited release of the facelifted Model Y arriving in Taiwan in the fourth quarter, a large number of deliveries in December reached 5,124 units, securing the top spot in the monthly total market ranking. Toyota Corolla Cross saw a 19.1% increase in sales compared to November, with 4,808 units, ranking second. Toyota RAV4's sales fell 2.6% from November, with 2,353 units, placing third. Honda HR-V sold 1,645 units, ranking fourth, while Toyota Town Ace sold 1,504 units, ranking fifth. Finally, Toyota Yaris Cross, CMC J Space, Mazda CX-5, Honda CR-V, and Toyota Corolla Altis sold 1,303, 1,221, 1,203, 1,134, and 1,104 units, ranking sixth, seventh, eighth, ninth, and tenth respectively.

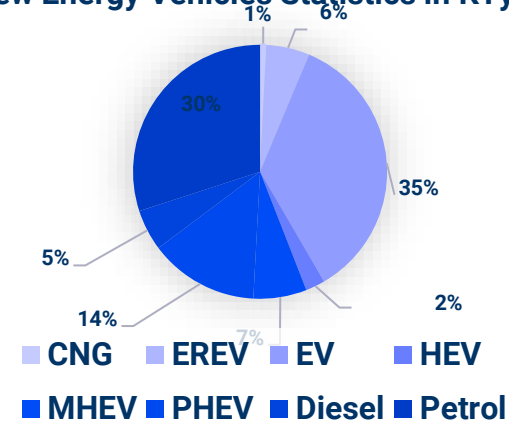


China JAN-DEC New Vehicle Analysis

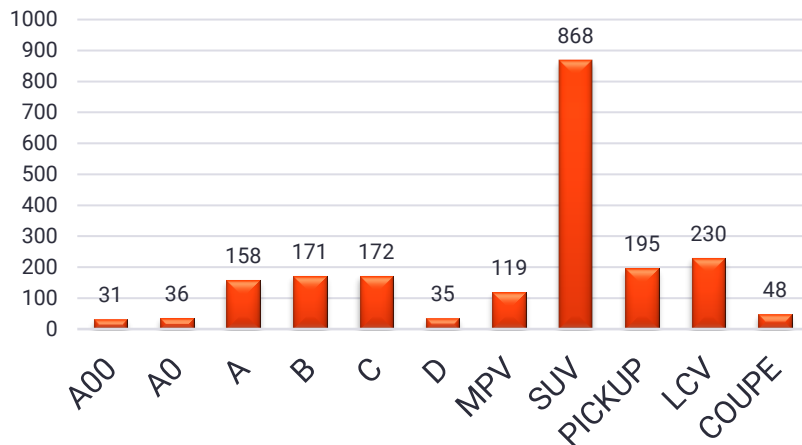
New vehicle statistics in KType



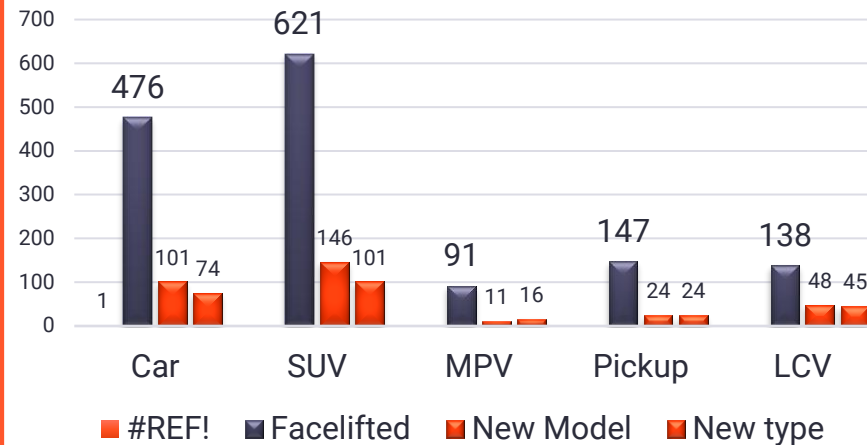
New Energy Vehicles Statistics in KType



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 2025**, the total coverage of **K-Type** was **2063**, of which **590** 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

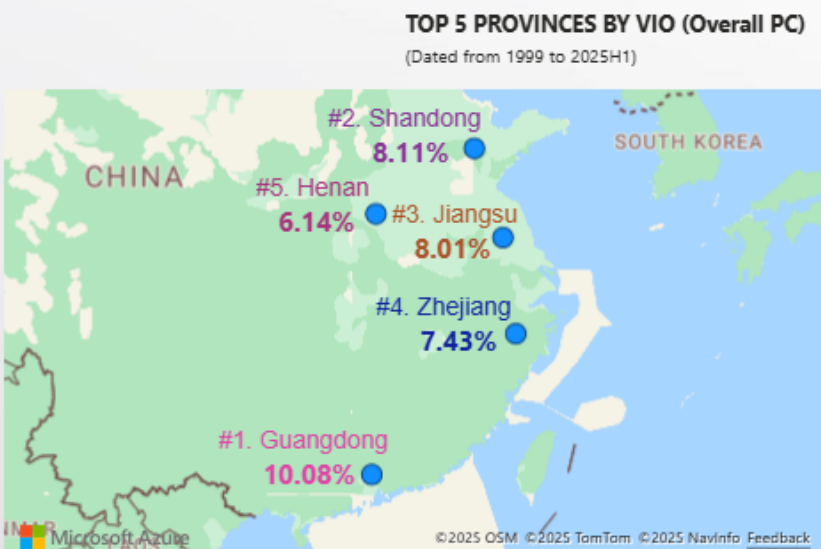
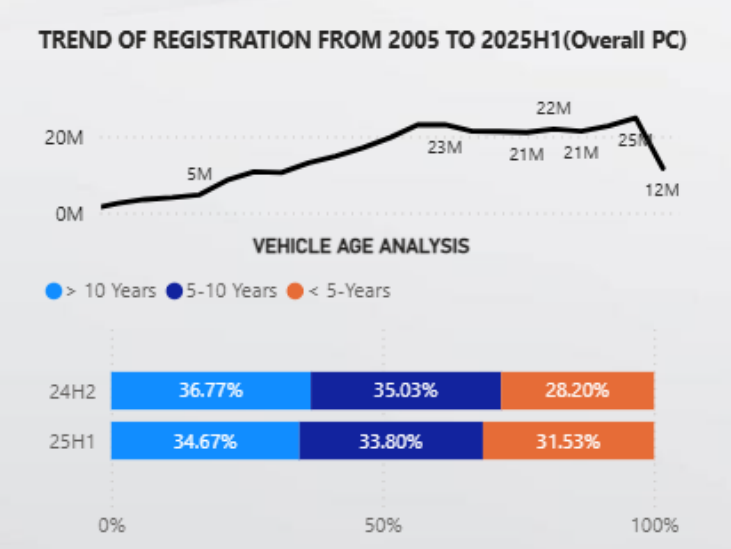
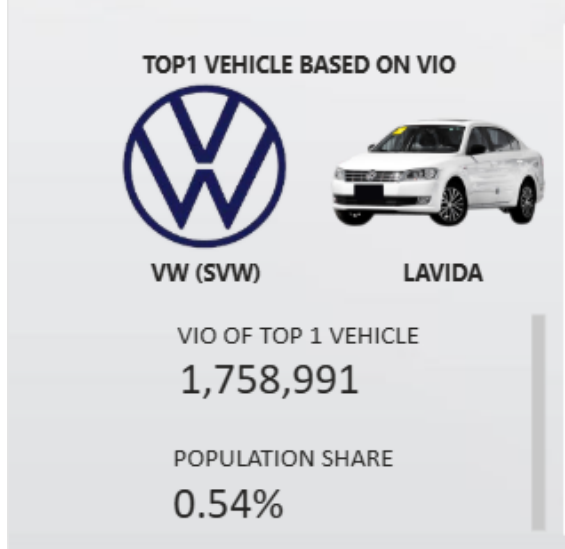
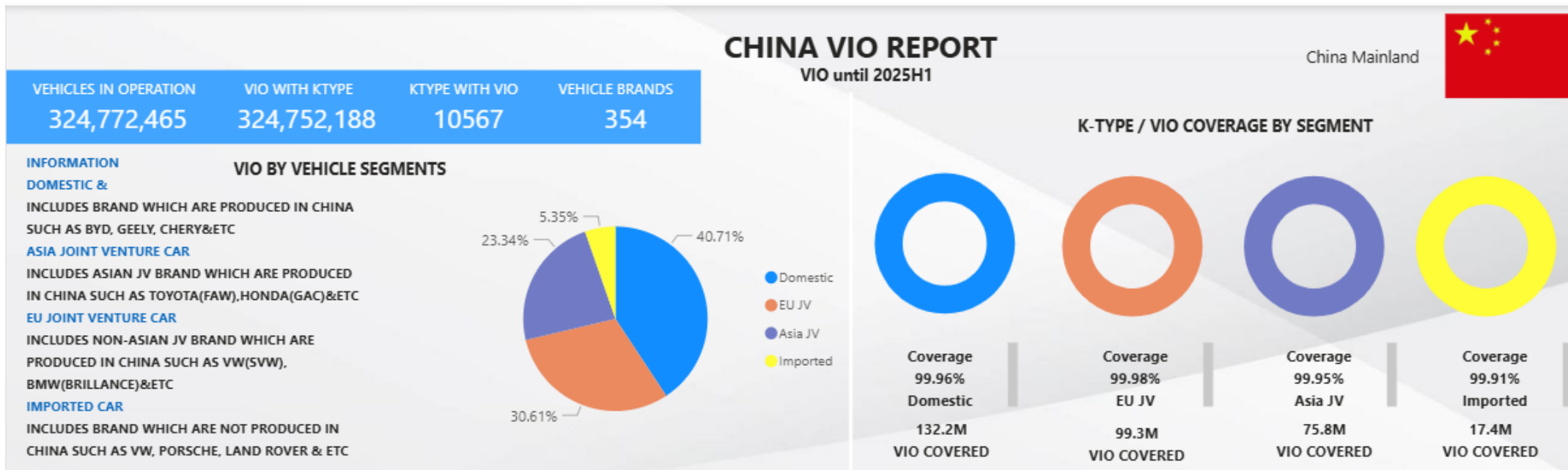
China New Vehicle Statistics

#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total
1	BYD	86	31	TOYOTA (GAC)	20	61	VOYAH	12	91	STELATO	7	121	MAEXTRO	3	150	ROX MOTOR	1
2	MERCEDES-BENZ	78	32	ISUZU (JIANGXI)	20	62	NISSAN (DFAC)	12	92	DENZA	7	122	SAIC	3	151	MAPLE	1
3	VW (FAW)	63	33	HAVAL	20	63	MINI	12	93	VGX	6	123	JAGUAR (CHERY)	3	152	LINGXI	1
4	JETOUR	57	34	JMC	19	64	NAC IVECO (NAVECO)	11	94	ONVO	6	124	SUBARU	3	153	MASERATI	1
5	CHANA	54	35	LEAPMOTOR	19	65	VOLVO ASIA	11	95	CADILLAC (SGM)	6	125	HYUNDAI (BEIJING)	3	154	HEDMOS	1
6	CHERY	53	36	BAW	17	66	MG (SAIC)	10	96	JEEP	6	126	FIREFLY	3	155	INEOS	1
7	DONGFENG (DFAC)	52	37	GALAXY	17	67	ZEEKR	10	97	ISUZU (QINGLING)	6	127	CITROËN (DF-PSA)	3	156	LAND ROVER (CHERY)	1
8	CHANGAN	46	38	GAC NE	17	68	FORD (CHANGAN)	10	98	GENESIS	6	128	LEVC	2	157	SUZUKI	1
9	MAXUS	45	39	TOYOTA (FAW)	16	69	LAND ROVER	10	99	JETTA	6	129	BAIC	2	158	OSHAN	1
10	HONGQI	44	40	COWIN	16	70	DONGFENG XIAOKANG	9	100	PEUGEOT (DF-PSA)	6	130	JUNEYAO AUTO	2	159	ASTON MARTIN	1
11	FENGXING	37	41	TANK	16	71	HYPER	9	101	VOLVO	6	131	VW (ANHUI)	2	160	LETIN	1
12	PORSCHE	36	42	GAC	16	72	LUXEED	9	102	WEY	6	132	VW	2			
13	FOTON	36	43	GREAT WALL	16	73	HONDA (DONGFENG)	9	103	212	5	133	NEOMOR	2			
14	VW (SVW)	34	44	IM MOTORS	15	74	HONDA (GAC)	9	104	AITO	5	134	VICTORY	2			
15	AUDI (FAW)	34	45	FORD (JMC)	15	75	LINCOLN (CHANGAN)	9	105	CAVAN	5	135	SWM MOTORS	2			
16	EXEED (CHERY)	30	46	ROEWE (SAIC)	15	76	MAZDA (CHANGAN)	9	106	BENTLEY	5	136	POLESTAR	2			
17	JAC	29	47	RADAR	15	77	RELY	8	107	M-HERO	5	137	LIVAN AUTO	2			
18	MERCEDES-BENZ (BBDC)	28	48	BESTUNE	14	78	KARRY	8	108	R AUTO	5	138	ZD	2			
19	DEEPAL	27	49	ARCFOX	14	79	FANGCHENGBAO	8	109	XIAOMI	4	139	INFINITI (DFAC)	2			
20	SKYWORTH	24	50	FARIZON AUTO	14	80	NISSAN (ZHENGZHOU)	8	110	ORA	4	140	ALFA ROMEO	2			
21	BMW (BRILLIANCE)	24	51	LEXUS	14	81	JMEV	8	111	JAC EV	4	141	FENGON	2			
22	QIYUAN	24	52	SRM (BRILLIANCE)	13	82	LIXIANG	8	112	FERRARI	4	142	KTM	1			
23	AVATR	24	53	AUDI	13	83	RCEV	8	113	YE	4	143	DONGFENG FUKANG	1			
24	ert	23	54	NEW BAOJUN	13	84	LINXYS	8	114	HYUNDAI	4	144	LAMBORGHINI	1			
25	WULING (SGMW)	23	55	TESLA	13	85	LANDIAN	8	115	REFINE	4	145	LINGBOX	1			
26	GEELY	23	56	NIO	13	86	KIA (DYK)	8	116	NAMMI	3	146	ROLLS-ROYCE	1			
27	BUICK (SGM)	22	57	BAIC-ORV	12	87	LOTUS	8	117	TOYOTA	3	147	AISHANG	1			
28	JINBEI	21	58	AUDI (SAIC)	12	88	AITO	8	118	YUFENG	3	148	MERCEDES-BENZ (FJDA)	1			
29	LYNK & CO	21	59	BMW	12	89	i CAR	7	119	YANGWANG	3	149	JETOUR	1			
30	AEOLUS	21	60	XPENG	12	90	SMART	7	120	VENUCIA	3						

Remarks:

All statistical data is based on K-Type. From **January to December 2025**, the total coverage of **K-Type** was **2063**, of which **590** were **New K-Type**.

China VIO Report



02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types of CN Vehicle Brands Researched

4014

Generic Articles of CN Vehicle Brands Researched

246

OE Numbers of CN Vehicle Brands Researched

150K

CN Vehicle Brands Covered

106

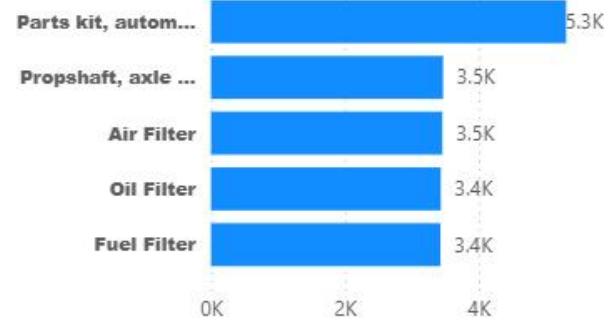


CHINA

2025

Dec...

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



Total number of OE for GEELY

13K



Total number of OE for BYD

12K

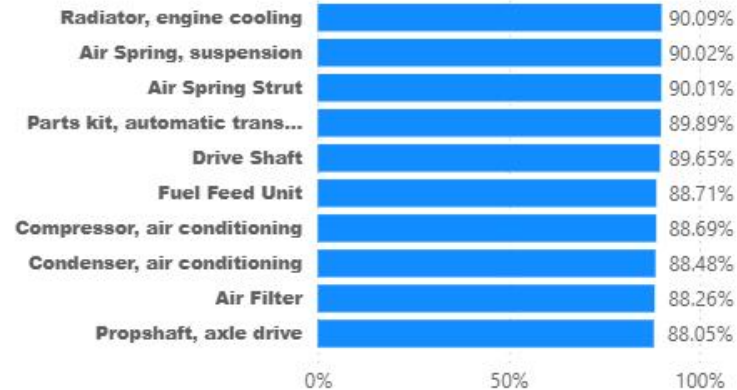


Total number of OE for CHANGAN

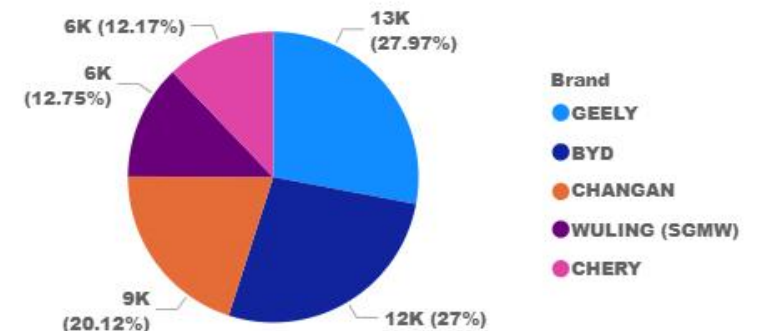
9K



Top 10 Generic Articles by Coverage (CN Vehicle Brands)



Top 5 CN Vehicle Brands by OE



03

Company News

- Happy Chinese New Year 2026!





马年大吉

財源滾滾

福

2026 HAPPY NEW YEAR

泰案联中国提前恭祝您
 新年快乐!
 万事如意!
 马年大吉!

吉祥如意

TecAlliance China Wishing You a Joyful Chinese New Year of Horse and May All Your Wishes Come True in Advance!

2026年泰案联春节放假安排 TecAlliance Spring Festival Holiday Arrangement

一	二	三	四	五	六	日
9 廿二	10 廿三	11 廿四	12 廿五	13 廿六	14 情人节	15 廿八
16 除夕	17 春节	18 雨水	19 初三	20 初四	21 初五	22 初六
23 初七	24 初八	25 初九	26 初十	27 十一	28 十二	1 十三

放假时间 2月15日-2月23日，共放假9天
 2月14日（周六）、2月28日（周六）正常上班

The office will be closed from Feb.15 to Feb.23.
 Feb.14 and Feb.28 will be normal working days.

©假期期间紧急联系方式| If any emergency during the holiday, please contact:
support.cn@tecalliance.net



Happy Chinese New Year 2026

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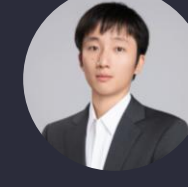
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THANK YOU!



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