

# TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version February 2025

## 01 Market Outlook

- China Mainland
- China Hong Kong
- China Taiwan

## 02 TecAlliance Data

- OES Data Overview

## 03 Company News

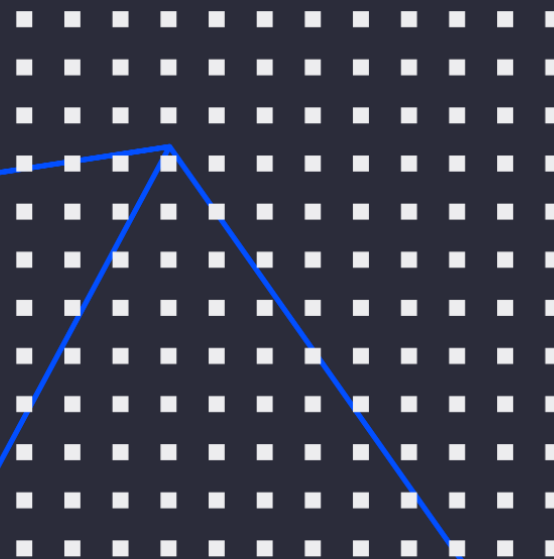
- 2025 China Marketing Communication Roadmap



# 01

## Market Outlook

China Mainland  
China Hong Kong  
China Taiwan



# China Mainland Highlight Vehicle News

The first use of the spirit kite drone, BYD Hiace 07 DM-i debuted!



- The BYD Hiace 07 DM-i / DM-p intelligent driving version was unveiled, and the new car is positioned as a mid-size SUV, using a plug-in hybrid and equipped with fifth-generation DM technology. At the same time, BYD also released the Lingkite intelligent vehicle-mounted UAV system that night, and the Hiace 07 DM-i is one of the first models to use the BYD Lingkite intelligent vehicle-mounted UAV system.
- As a model equipped with a drone, the rear of the BYD Hiace 07 DM Intelligent Driving Edition has a dark protruding drone compartment, which is very recognizable. The BYD Lingkite intelligent vehicle-mounted drone system it is equipped with is jointly developed by BYD and DJI. BYD said that in the future, Dynasty, Ocean, Formula Leopard, Denza, and Yangwang's SUV models are expected to launch solutions equipped with Lingyuan intelligent vehicle-mounted drones
- Based on the world's first vehicle-mounted drone integrated by BYD and DJI, the Hiace 07DM-i intelligent driving version can realize dynamic take-off and landing of drones, intelligent follow-up, and one-click return. The car machine system has a built-in spirit kite APP, which can be made into a film with one click.

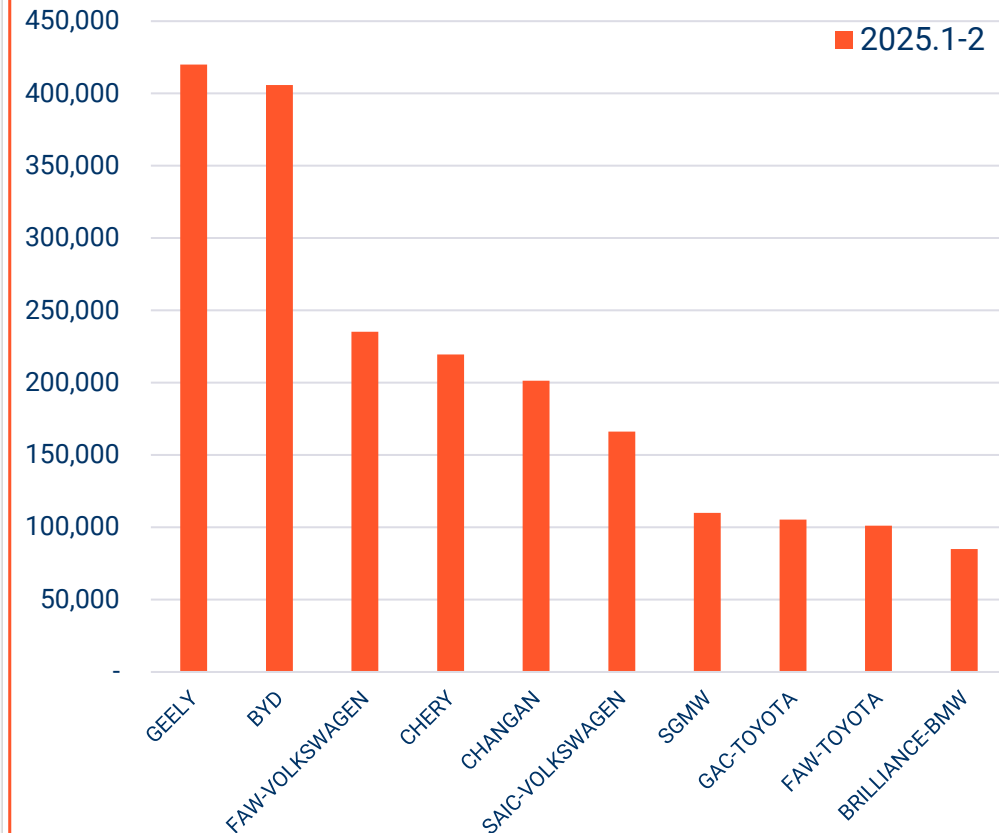
# China Mainland Highlight Vehicle News

## Top 10 manufacturer sales rankings in January to February 2025



### Sales comparison

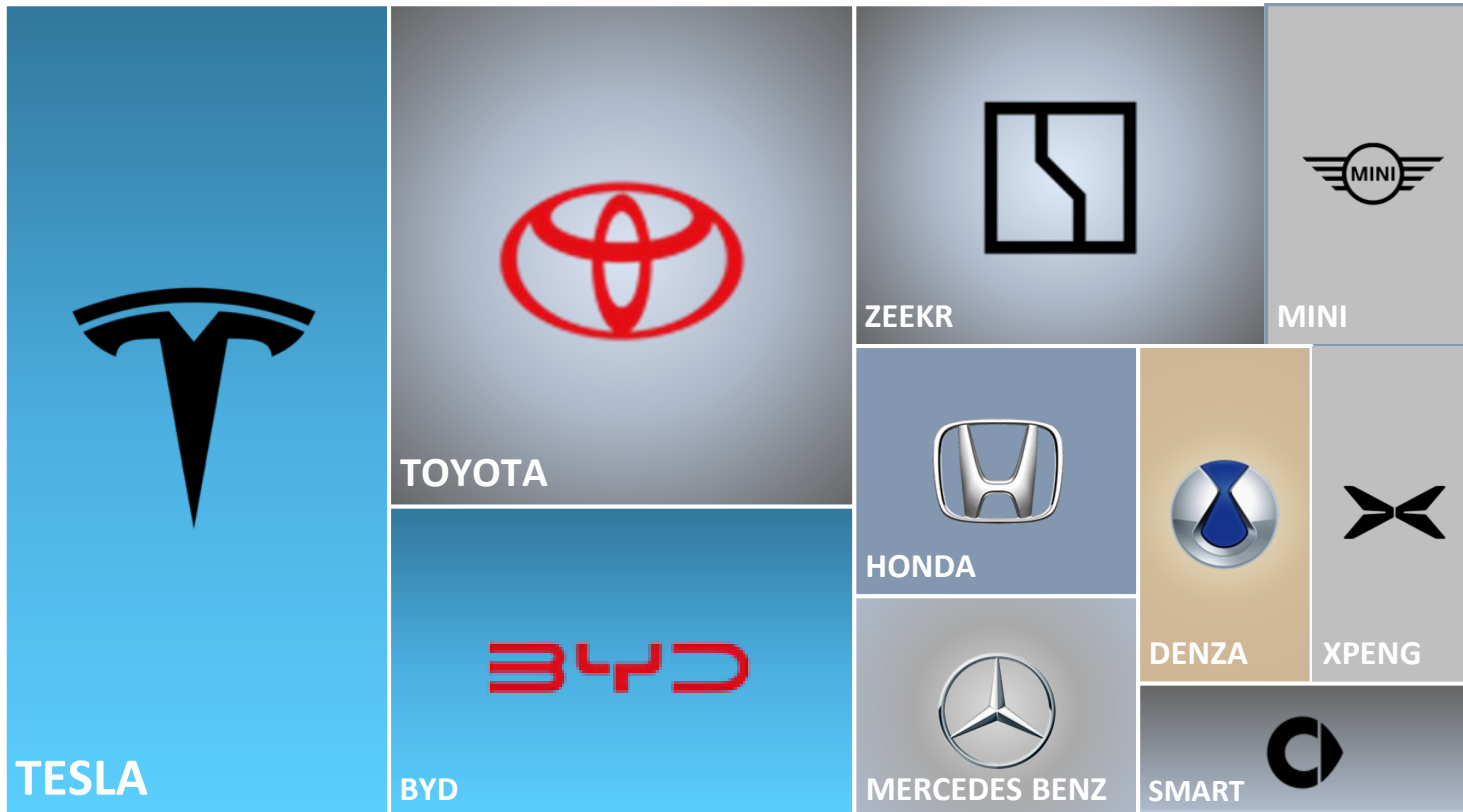
From the sales figures from January to February, GEELY's sales are ahead of other brands.



# Hong Kong Highlight Vehicle News

## Hong Kong December 2024 Vehicle News

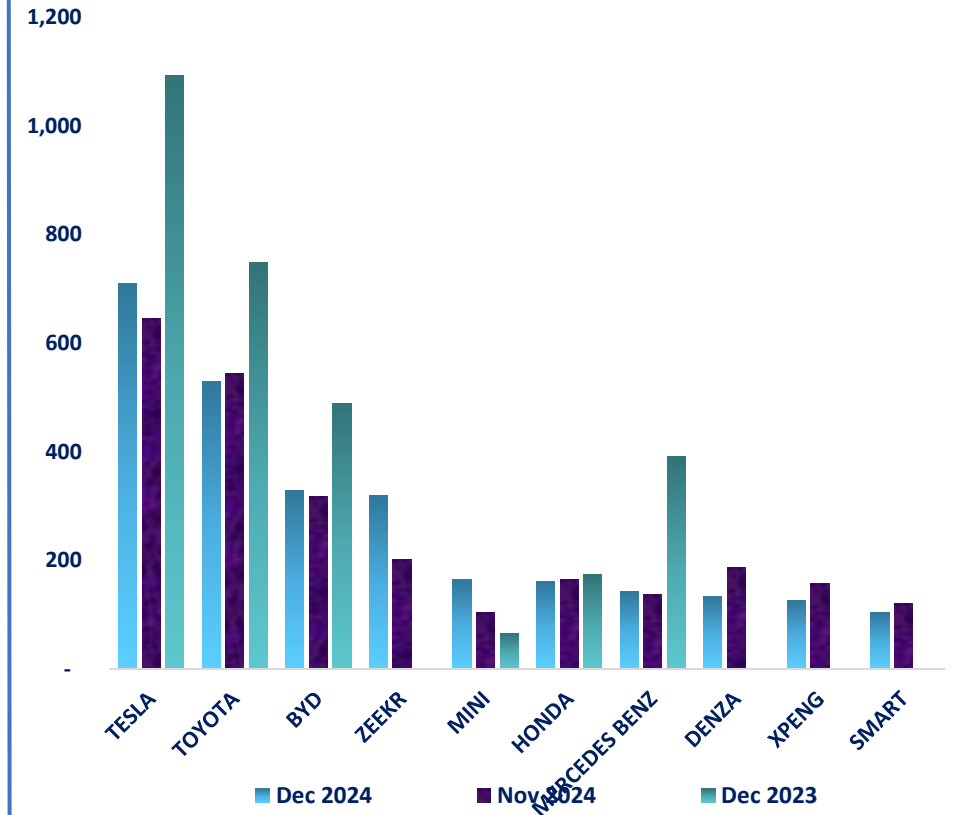
Hong Kong passenger car sales were 3,584 units in December 2024 and 3,561 units in November 2024, up 0.6% month-on-month. Tesla sold 710 units and continued to be the most popular car brand in Hong Kong. Toyota ranked second with 530 units sold, down 2.6% month-on-month. BYD's sales volume increased by 3.8% month-on-month, ranking third; ZEEKR's sales volume increased by 58.7% month-on-month, ranking fourth; MINI ranked fifth with 164 units sold; The sales of the remaining top 10 brands showed varying degrees of decline. In terms of overall market share, the market size of new energy vehicles 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 December, TESLA continued to win the top spot in Hong Kong car sales, with Toyota ranking second with a monthly sales volume of 530 vehicles and BYD ranking third with 329 vehicles. ZEEKR ranks fourth with 319 vehicles, MINI ranks fifth with 164 vehicles, and Honda ranks sixth with 161 vehicles. The 7th is MERCEDES BENZ, with 143 units sold. DENZA, XPENG, and SMART sold 133, 127, and 104 units respectively, ranking 8th, 9th, and 10th.



# Taiwan Highlight Vehicle News

## Taiwan Auto Sales Report for February 2025



The number of new car licenses in February was 27,515 units, compared with January before the Lunar New Year, the sales scale declined by 21.5%, reflecting that after the promotion and delivery sprint before the Lunar New Year, regardless of the annual switching between the original manufacturer and the general agent, coupled with the adjustment of the sales rhythm of the distribution system, the purchase and delivery of new cars after the Lunar New Year have become flat.

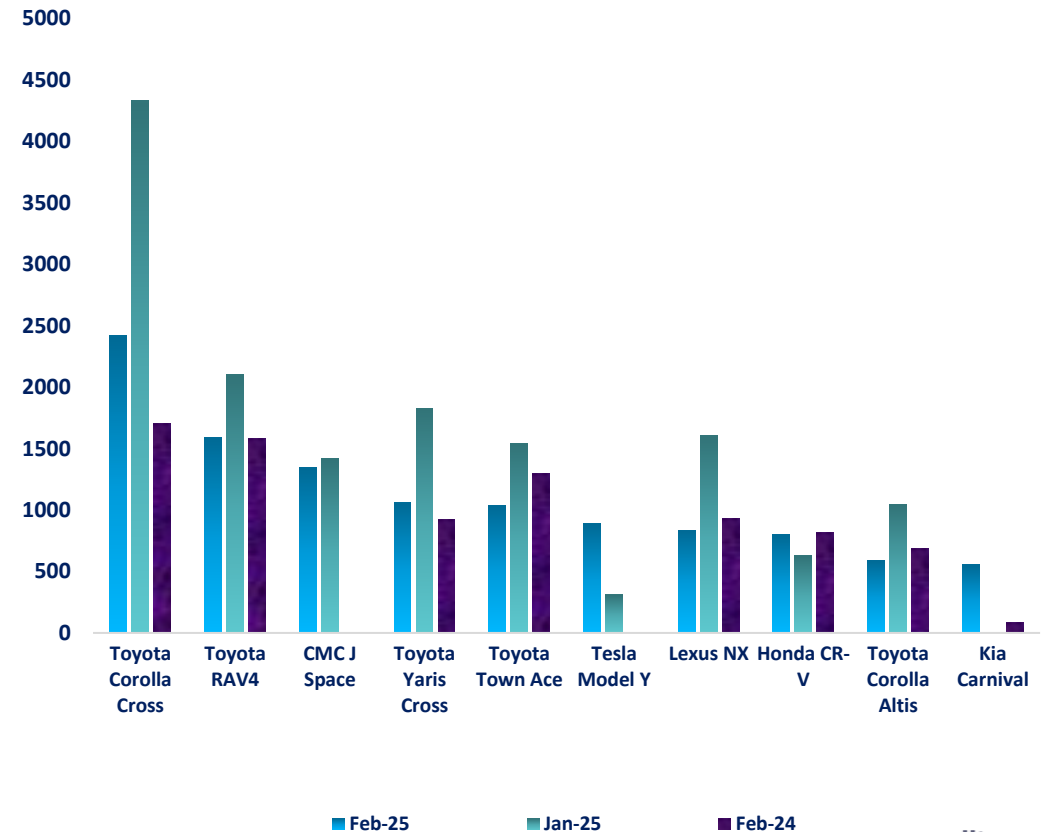
As for the sales volume compared to the same period in February 2024, the sales volume increased by 4.8%, mainly because after deducting the holiday days including the Lunar New Year holiday in February 2024, there were only 16 licensed working days, which was a full 4 days less than the 20 working days in February 2025, which also became the main reason for the relative sales growth in February 2025.

The traditional off-season after the Lunar New Year does coincide with the less impressive sales data in February, but if we look at the year-to-date performance, the total market in January and February has reached 62,579 units, a decline of 12% compared with the same period in 2024, which also makes the annual development outlook uncertain.

## ■ Sale Comparison

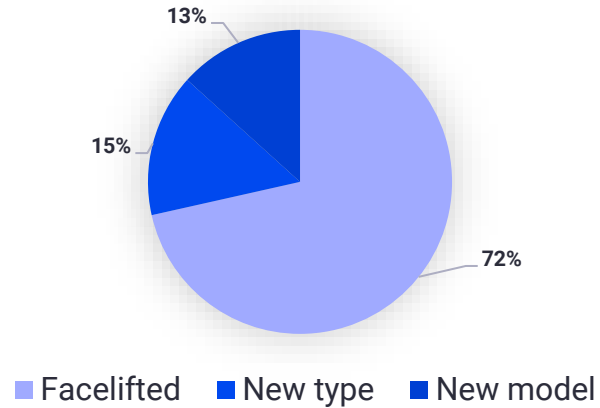
Overall, new car purchases and deliveries have become flat

Toyota Corolla Cross and Toyota RAV4 topped the market with 2,423 and 1,593 units respectively. Chunghwa J Space sales fell 5.1% from January to third place with 1,345 units. Toyota's Yaris Cross sales fell 42% from January to fourth place with 1,060 units. Toyota's Town Ace came in fifth place with 1,039 units sold, while Tesla's Model Y was sixth with 890 units sold. Finally, Lexus NX, Honda CR-V, Toyota Corolla Altis, and Kia Carnival ranked seventh, eighth, ninth, and tenth with 836, 799, 593, and 554 units, respectively.

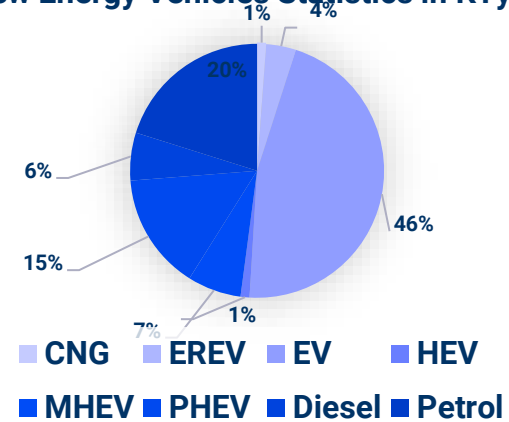


# China JAN-FEB New Vehicle Analysis

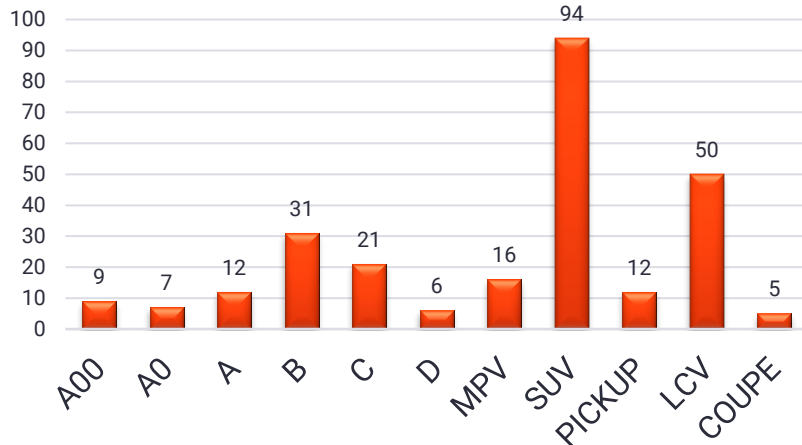
New vehicle statistics in KType



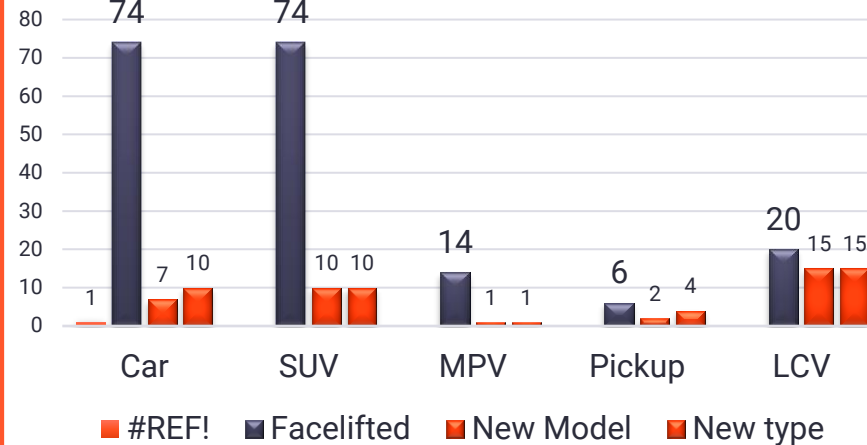
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to February 2025**, the total coverage of **K-Type** was **263**, of which **75** 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	38
2	MAXUS	16
3	AUDI (FAW)	11
4	VW (FAW)	11
5	CHANA	10
6	MERCEDES-BENZ	9
7	CHANGAN	9
8	JETOUR	8
9	NAC IVECO (NAVECO)	8
10	DEEPAL	7
11	AEOLUS	6
12	erit	5
13	CHERY	5
14	EXEED (CHERY)	4
15	FOTON	4
16	LOTUS	4
17	IM MOTORS	4
18	MERCEDES-BENZ (BBDC)	4
19	TANK	3
20	LEAPMOTOR	3
21	HONGQI	3
22	JMC	3
23	TESLA	3
24	JMEV	3
25	JAC	3
26	DONGFENG (DFAC)	3
27	FENGXING	3
28	GALAXY	3
29	BESTUNE	3
30	GAC NE	3

#	Brand	Total
31	TOYOTA	2
32	i CAR	2
33	ISUZU (JIANGXI)	2
34	SKYWORTH	2
35	JINBEI	2
36	FORD (JMC)	2
37	COWIN	2
38	ROEWE (SAIC)	2
39	SRM (BRILLIANCE)	2
40	VICTORY	2
41	BMW (BRILLIANCE)	3
42	WULING (SGMW)	2
43	SINOTRUK (CNHTC)	2
44	DENZA	2
45	AVATR	2
46	VOYAH	2
47	NEOMOR	2
48	REFINE	2
49	TOYOTA (GAC)	1
50	BAIC	1
51	LIVAN AUTO	1
52	QIYUAN	1
53	MERCEDES-BENZ (FJDA)	1
54	PEUGEOT (DF-PSA)	1
55	JETTA	1
56	RCEV	1
57	BAW	1
58	LETIN	1
59	NAMMI	1
60	VGX	1

#	Brand	Total
61	AUDI	1
62	MAPLE	1
63	GEELY	1
64	LINXYS	1
65	GAC	1
66	NISSAN (DFAC)	1
67	MINI	1
68	NEW BAOJUN	1
69	TOYOTA (FAW)	1
70	BENTLEY	1
71	KARRY	1
72	SMART	1
73	XIAOMI	1
74	LAND ROVER	1
75	VENUCIA	1

## Remarks:

All statistical data is based on K-Type. From **January to February 2025**, the total coverage of **K-Type** was **263**, of which **75** 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

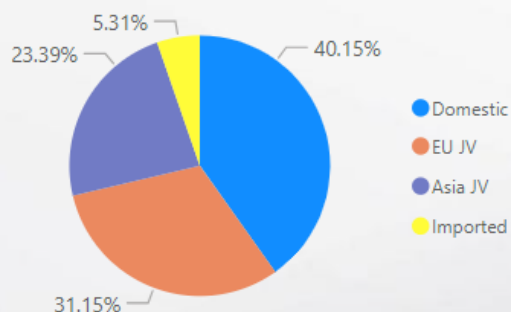
#### EU JOINT VENTURE CAR

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

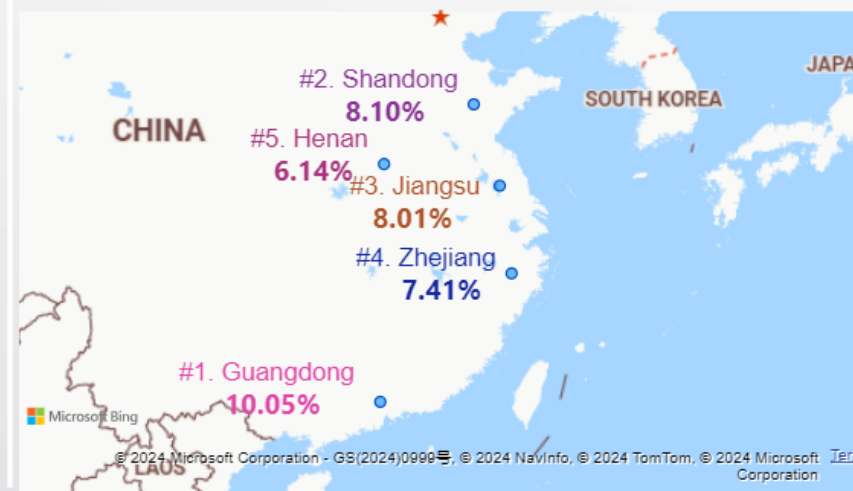
0.61%

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



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

(Dated from 1999 to 2024H1)

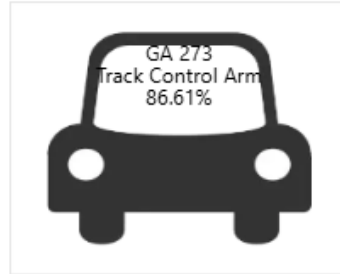


# 02

## TecAlliance Data OES Data Overview



# OE Coverage by VIO



NUMBER of Specific  
GA for NEV

10

NUMBER of GA for  
NEV & ICE

63

Feb-2025 Update

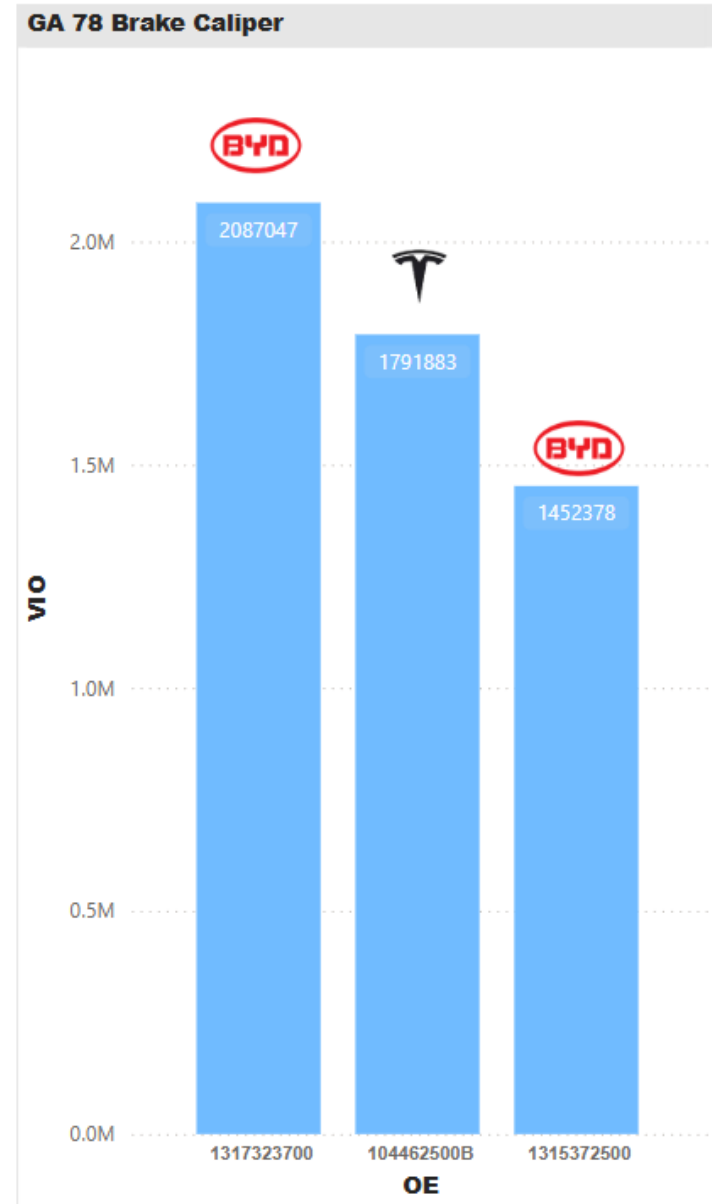
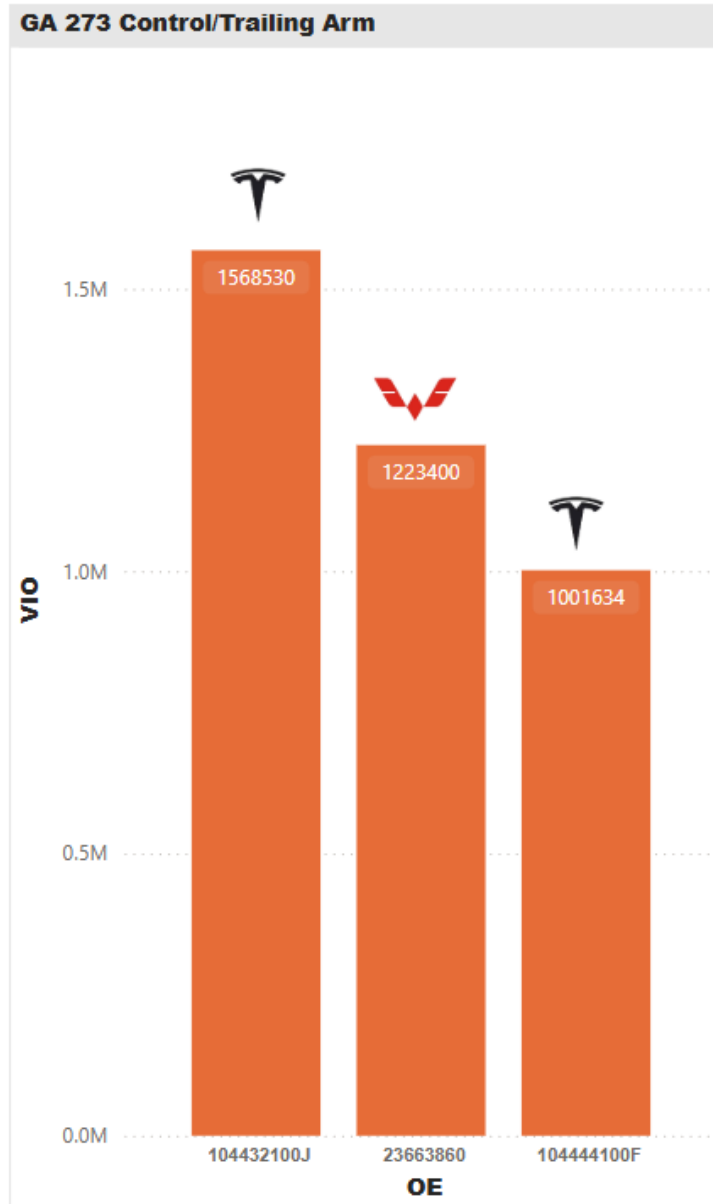
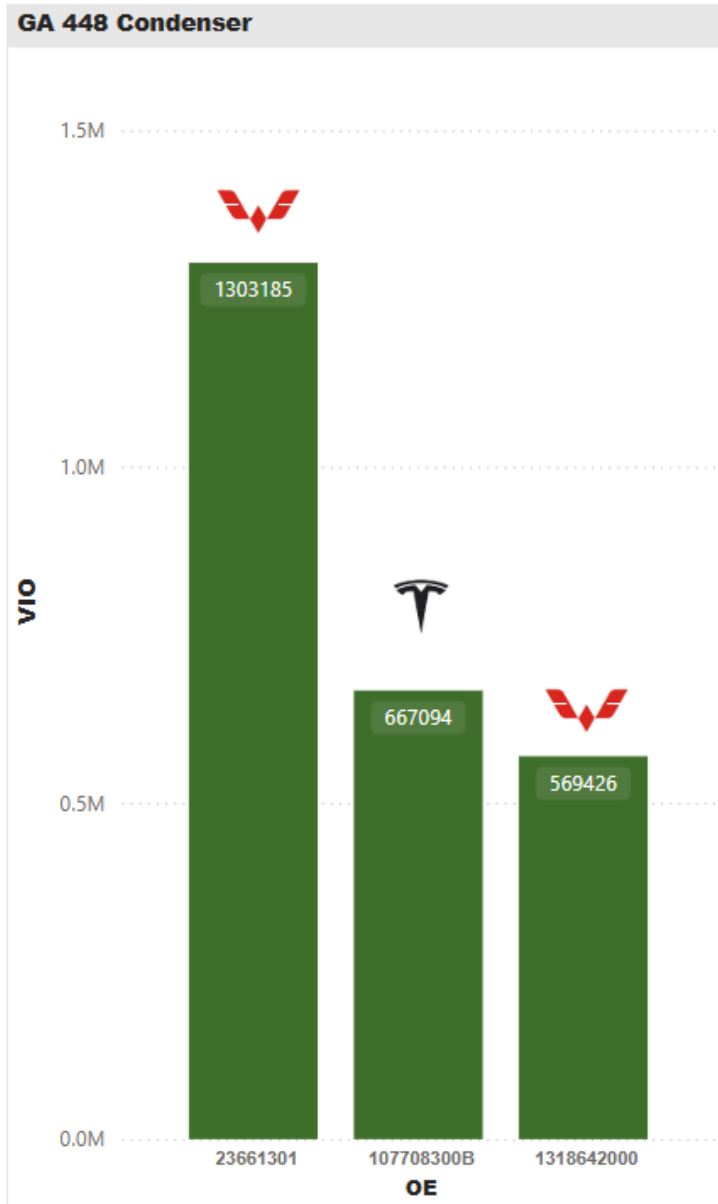
Based on 2024H1

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
854	Shock Absorber	87.55%
286	Steering Gear	86.72%
273	Track Control Arm	86.61%
447	Compressors	85.51%
298	Wiper Blade	84.74%
424	Interior air Filter	83.69%
402	Pad (disc brake)	81.75%
82	Disc	81.48%
654	Wheel Bearing Kit	80.36%
1	Starter Battery	79.79%
448	Condenser	79.73%
78	Caliper cylinder (housing)	78.57%
83	Brake hose	78.44%
508	Radiator Fan Complete	77.03%
793	Electric Motor Blower	76.71%
412	Sensor, wheel speed	74.85%
3229	Link,(Rod/Strut) stabilizer	73.78%
13	Drive Shaft	68.37%
1561	Regulator>window	67.34%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
471	Evaporators	66.60%
219	Gas spring boot-/cargo area	66.21%
1351	Additional Water Pump	66.10%
467	Heat Exchanger, interior heating	65.17%
5031	Radiator, Drive Battery	64.95%
1211	Steering Column	63.77%
397	Expansion Tank, coolant	63.15%
1180	Suspension Strut Support Mounting	62.55%
1182	Rubber Buffer, suspension	56.67%
3365	Cover/Rubber Boot, shock absorber	55.80%
247	Mounting, engine	54.20%
914	Tie Rod End	53.79%
183	Expansion Valve, air conditioning	53.52%
1626	Friction Bearing	52.15%
2232	Wheel Sensor,tyre pressure control system	50.91%
258	Brake Master Cylinder	41.65%
200	Electro Motor, window regulator	39.06%
8558	Battery Pack/48 V Battery	36.72%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
2462	Ball Joint,(Support-/Controlarm Link)	31.88%
60573	Electromotor	30.16%
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%
60506	Inverter Converter	27.18%
514	Gas spring engine flap	24.82%
191	Bellows (steering)	24.03%
60172	Charger, Traction battery	24.01%
123	Drum	21.74%
70	Shoe (drum brake)	20.76%
851	Receiver Driers	20.08%
60173	Control Unit, battery management	19.11%
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%

# Top 3 Coverage of OE by VIO



# 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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