

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version January 2025

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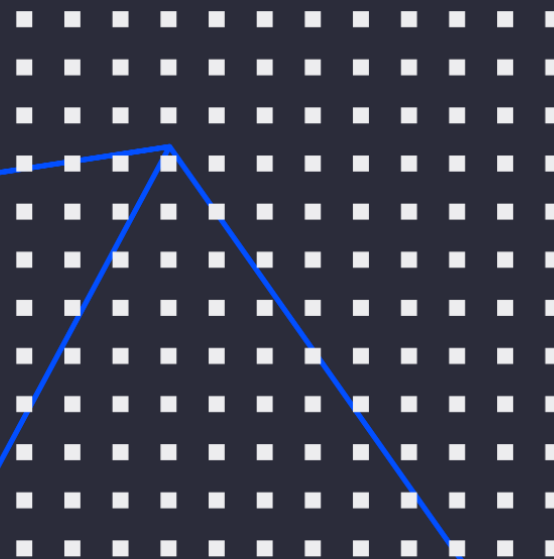
- 2025 China Marketing Communication Roadmap



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



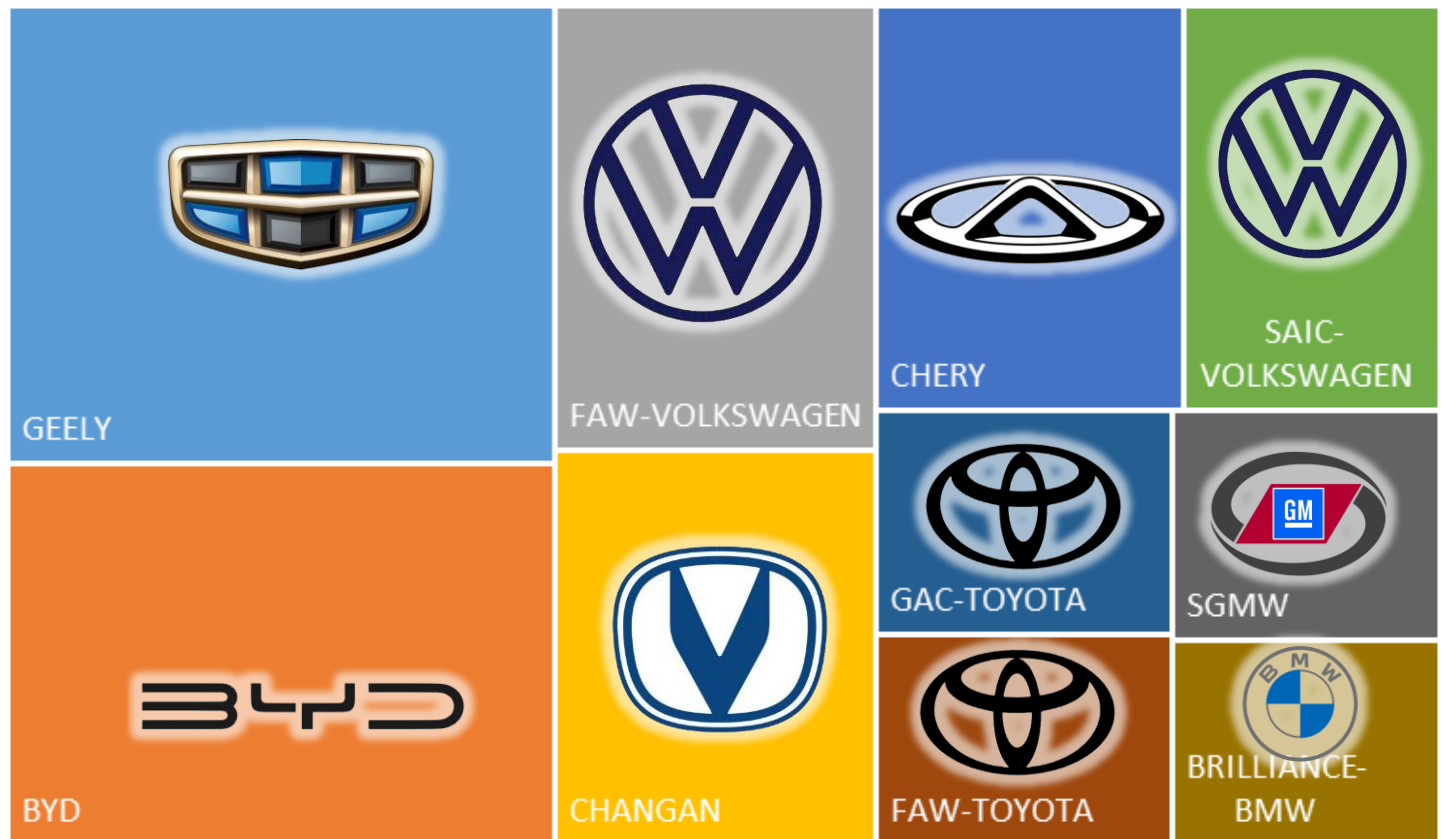
BYD's "Eye of the Gods"'s conspiracy: high-end intelligent driving has entered the 70,000-level market



- Starting this year, BYD's first batch of 21 models will be fully equipped with the "Eye of the Gods" high-end intelligent driving system. On February 10, Wang Chuanfu officially announced at BYD's intelligent strategy conference, and hoped that through BYD's "Eye of the Gods" system, everyone can enjoy high-end intelligent driving. This includes 100,000 yuan new energy vehicles such as dynasty series (Qin, Song, Yuan) and ocean series (seals, sea lions, dolphins).
- In the past two years, BYD has launched a price war to gain market share. However, according to people familiar with the matter, due to the "window guidance" of the competent authorities in the near future, BYD will face a lot of public pressure if it increases the intensity of the price war. As a result, at the beginning of 2025, BYD changed its strategy and implemented a "value race" - large-scale popularization of intelligent driving systems on its mainstream models, and no price increase.

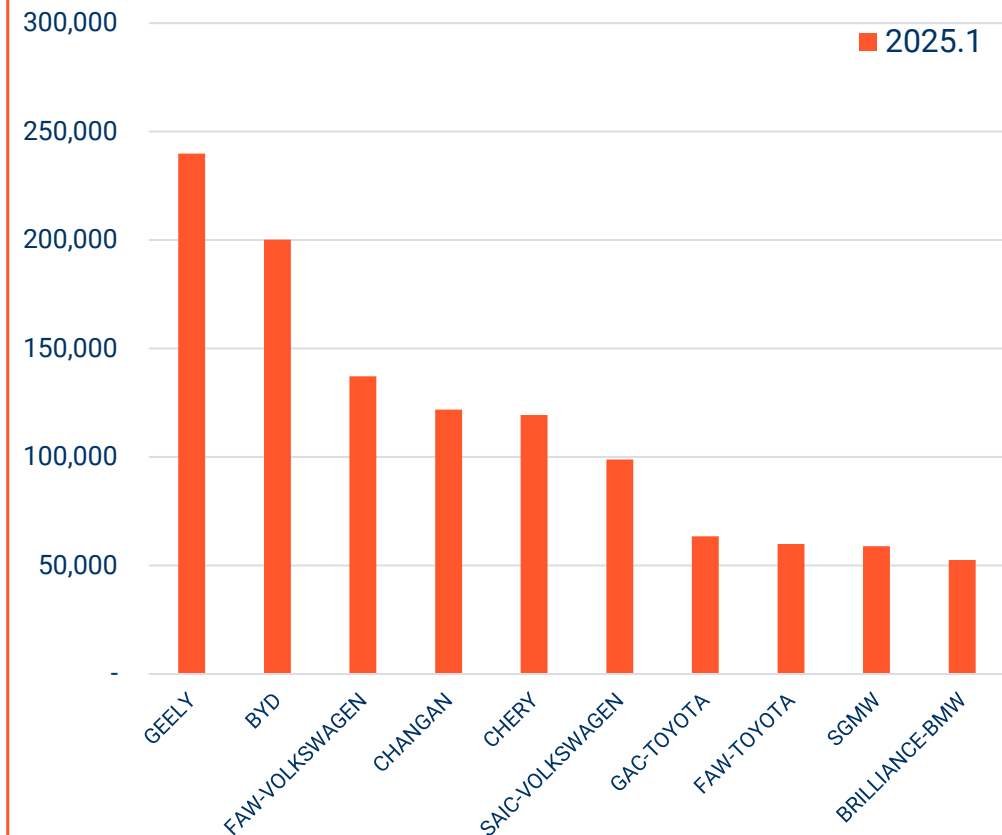
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in January 2025



Sales comparison

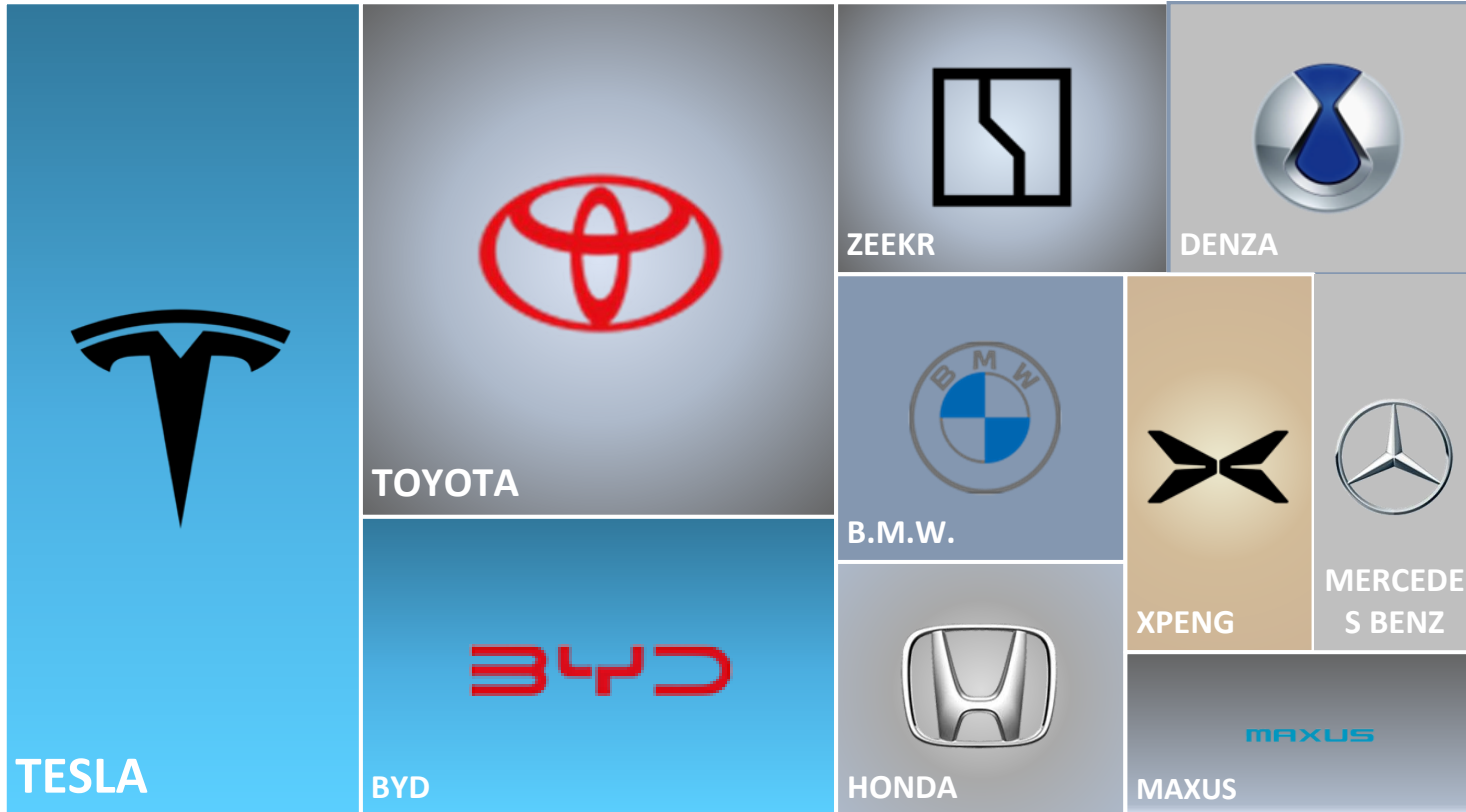
From the sales figures from January, GEELY's sales are ahead of other brands.



Hong Kong Highlight Vehicle News

Hong Kong November 2024 Vehicle News

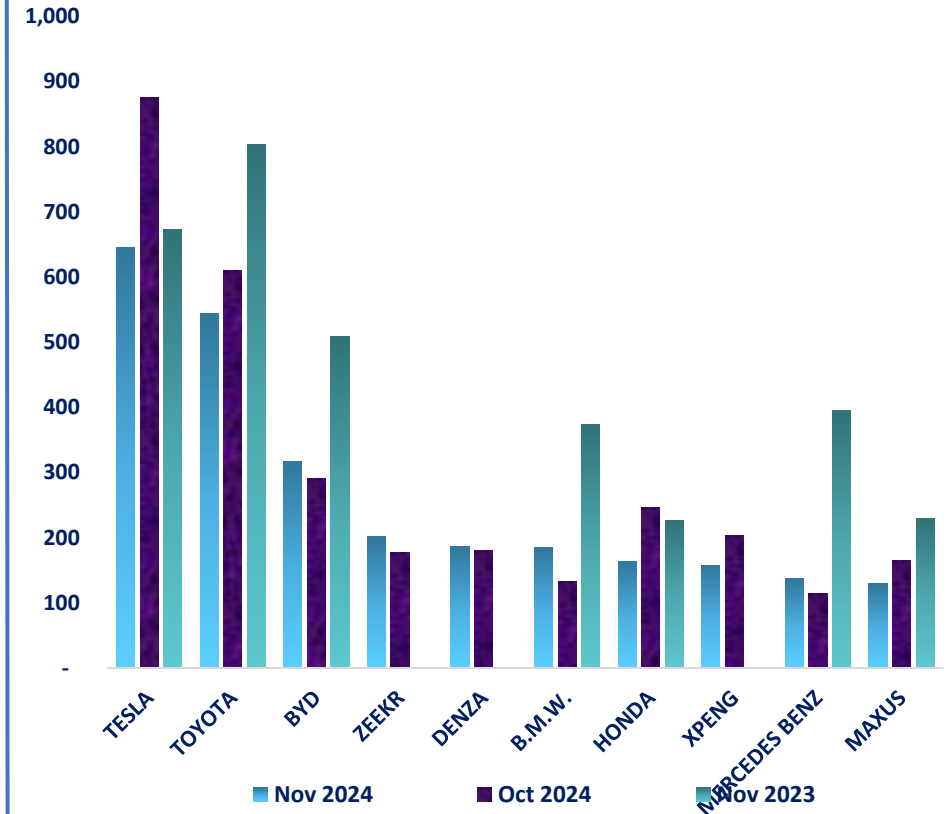
Hong Kong passenger car sales were 3,561 rounds in November 2024 and 3,829 rounds in October 2024, down 7% month-on-month. With a sales volume of 645 units, Tesla continues to be the most popular car brand in the Hong Kong area. Toyota came in second with 544 cargos sold, down 10.8% month-on-month. BYD's sales volume increased by 9.3% month-on-month, ranking third. ZEEKR sales increased by 13.6% month-on-month, ranking fourth. DENZA came in fifth place with 187 units sold. The gap between the remaining top 10 brands is gradually narrowing. 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 November, TESLA continued to win the Hong Kong car sales championship. Toyota ranked second with monthly sales of 544 units. BYD ranked third with 317 units. Several new mainland players moved closer to the top 10 in Hong Kong, with ZEEKER in fourth place with 201 units, DENZA in fifth place with 187 units and XPENG in eighth place with 158 units. In 10th place was MAXUS, with 129 units sold. BMW, Honda and Hirsch sold 185, 164 and 138 units, respectively, ranking sixth, seventh and 10th.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for January 2025

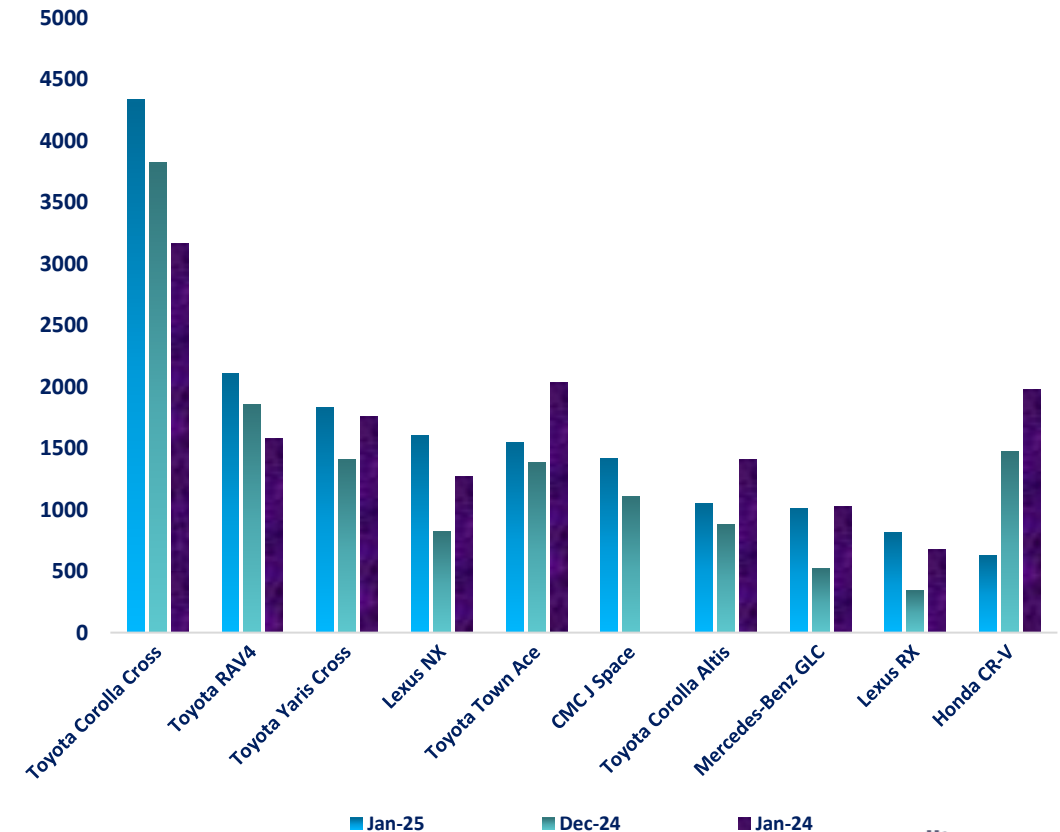


There are 31 days in January 2025, but the Lunar New Year holiday falls just at the end of January, and after deducting the New Year's Day and the weekly holiday on January 1, the actual number of working days that can be licensed in January is only 17 days, which somewhat restricts the development of new car sales. Finally, the number of new car licenses for the month reached 35,064, a decline from the previous month to the previous year, which was 15.1% compared to December 2024 and 21.8% compared to January 2024. From the New Year's Eve to the Lunar New Year, this period is one of the peak sales periods for traditional new car sales, and it is also the opportunity for automakers to actively de-energize the old New Year-style models and prepare for the introduction of New Year-style cars after the Lunar New Year.

■ Sale Comparison

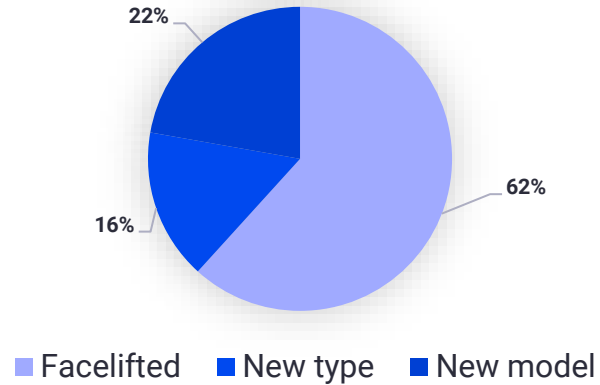
The overall market is in a downward trend

Toyota Corolla Cross and Toyota RAV4 topped the market with 4,336 and 2,107 units respectively. Toyota's Yaris Cross sales increased by 29.7% from December, ranking third with 1,829 units. Sales of the Lexus NX increased by 95.3% from December, ranking fourth with 1,607 units. Toyota's Town Ace was in fifth place with 1,545 units sold, while CMC J Space was sixth with 1,418 units sold. Finally, Toyota Corolla Altis, Mercedes-Benz GLC, Lexus RX, and Honda CR-V ranked seventh, eighth, ninth, and tenth with 1,049, 1,014, 811, and 629 units, respectively.

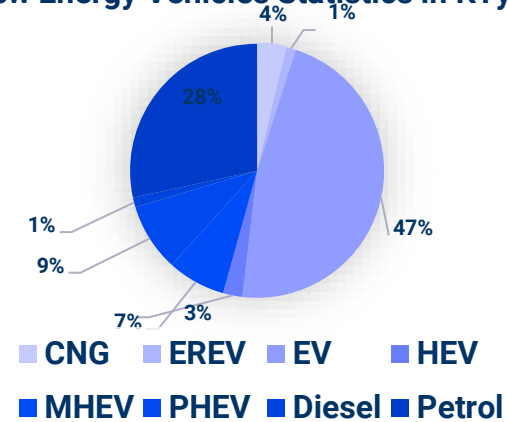


China JAN New Vehicle Analysis

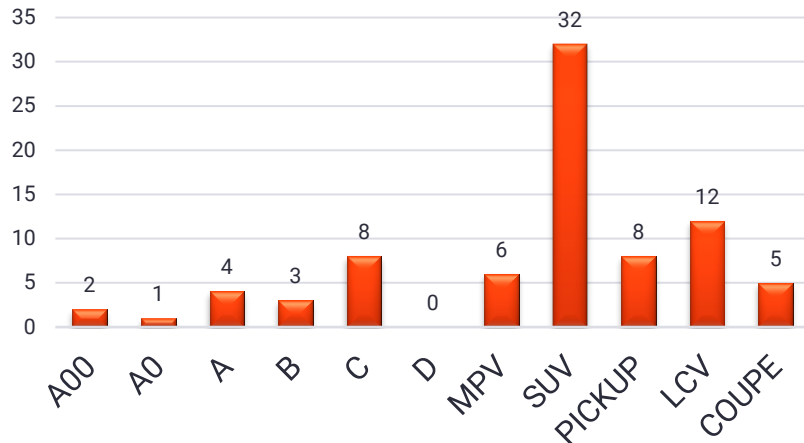
New vehicle statistics in KType



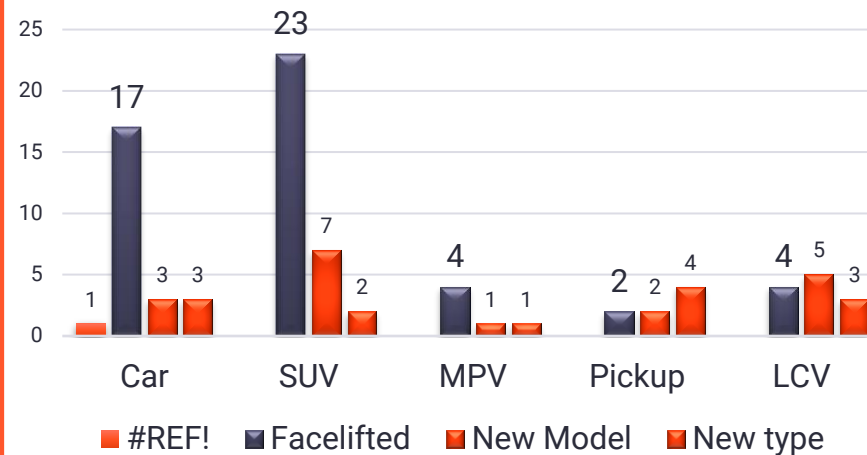
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January 2025**, the total coverage of **K-Type** was **81**, of which **31** 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

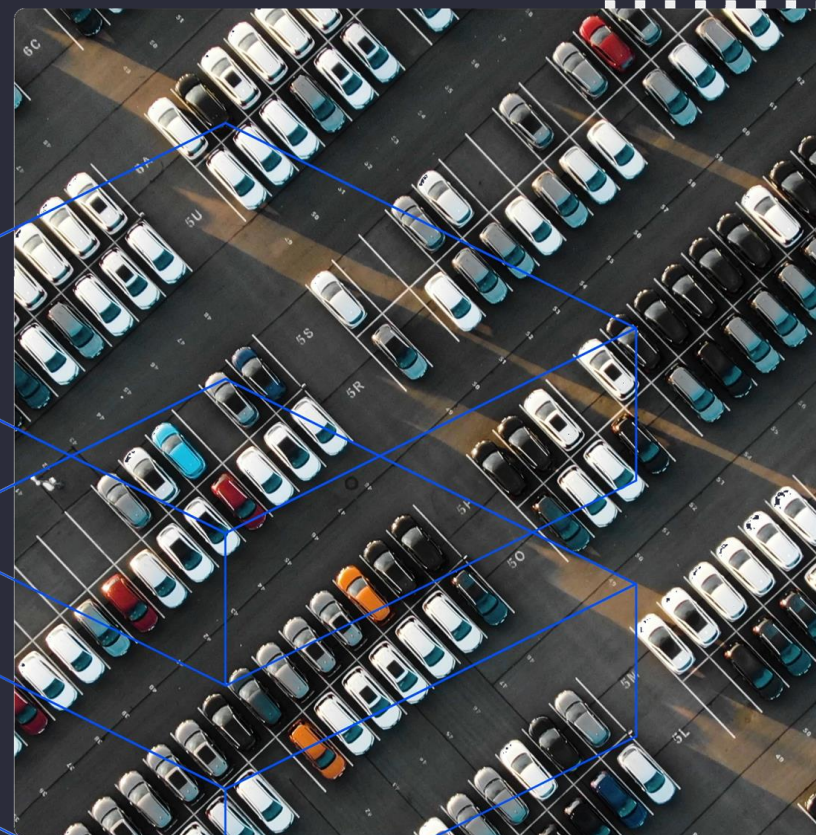
#	Brand	Total	#	Brand	Total
1	JETOUR	8	31	RCEV	1
2	VW (FAW)	7	32	JAC	1
3	AUDI (FAW)	5	33	BAW	1
4	MERCEDES-BENZ	5	34	NAC IVECO (NAVECO)	1
5	MAXUS	5	35	COWIN	1
6	erπ	3	36	LETIN	1
7	JMC	3	37	NAMMI	1
8	TESLA	3			
9	JMEV	3			
10	EXEED (CHERY)	2			
11	AEOLUS	2			
12	TOYOTA	2			
13	i CAR	2			
14	ISUZU (JIANGXI)	2			
15	HONGQI	2			
16	SKYWORTH	2			
17	JINBEI	2			
18	FORD (JMC)	2			
19	FOTON	2			
20	DONGFENG (DFAC)	2			
21	TOYOTA (GAC)	1			
22	TANK	1			
23	BAIC	1			
24	LIVAN AUTO	1			
25	LEAPMOTOR	1			
26	QIYUAN	1			
27	BYD	1			
28	MERCEDES-BENZ (FJDA)	1			
29	PEUGEOT (DF-PSA)	1			
30	JETTA	1			

Remarks:

All statistical data is based on K-Type. From **January 2025**, the total coverage of **K-Type** was **31**, of which were **New K-Type**.

02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types of EU Vehicle Brands Researched | YTD 2025

964

Generic Articles of EU Vehicle Brands Researched | YTD 2025

210

OE Numbers of EU Vehicle Brands Researched | YTD 2025

36K

EU Vehicle Brands Covered | YTD 2025

36

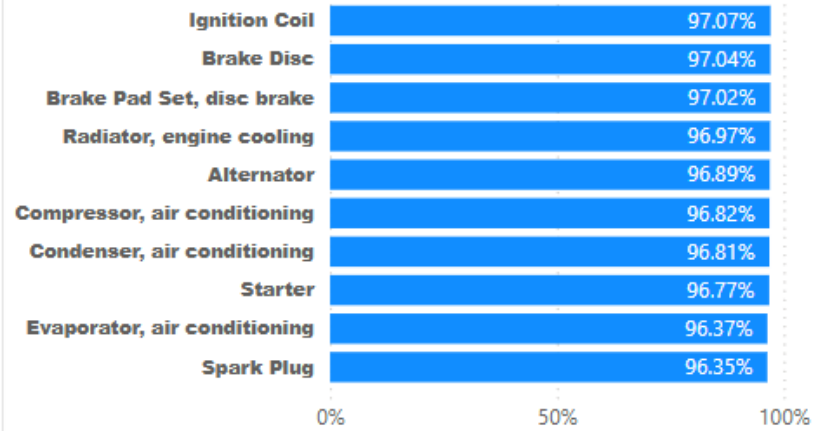
CHINA ▾

2025 ▾

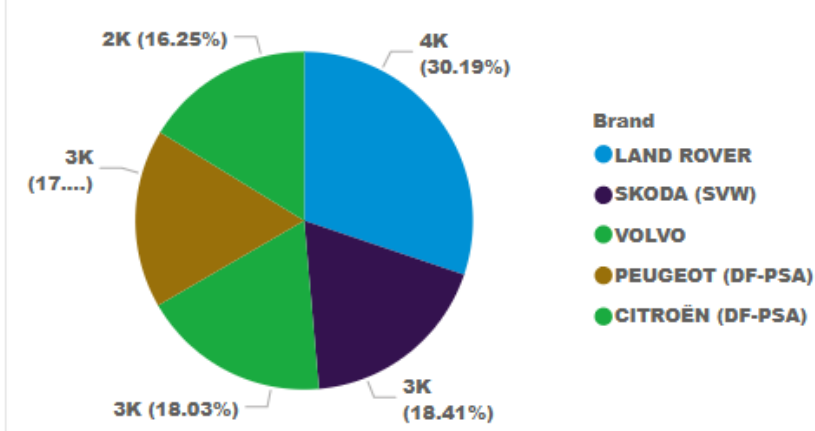


January ▾

Top 10 Generic Articles by Coverage (EU Vehicle Brands)

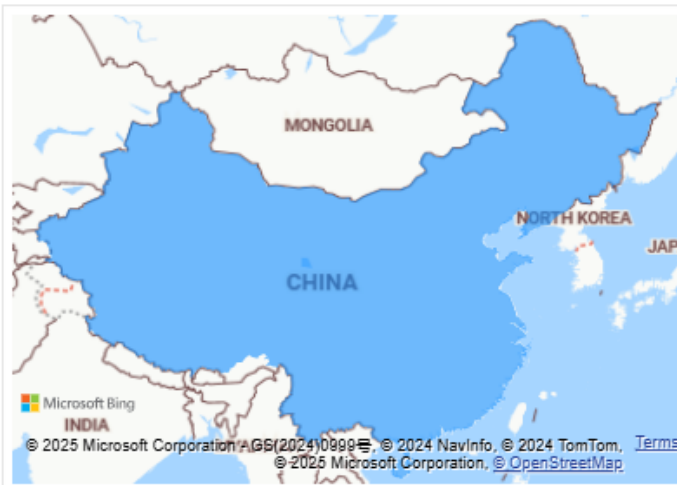


Top 5 EU Vehicle Brands by OE

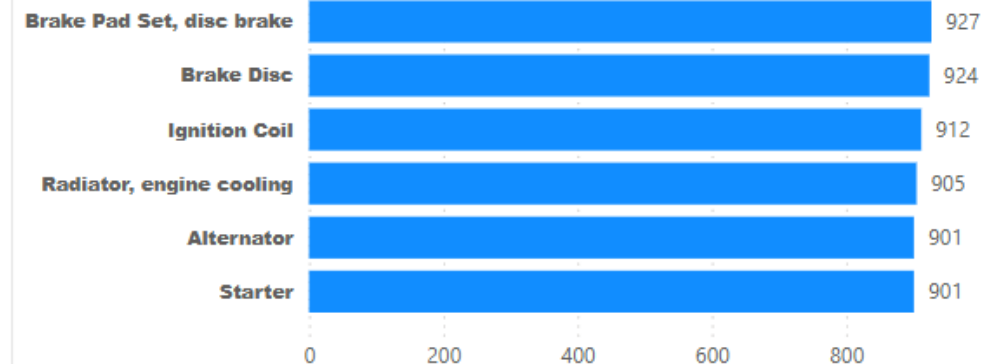


Total OE numbers of Volvo

4464



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



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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