

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version July 2025

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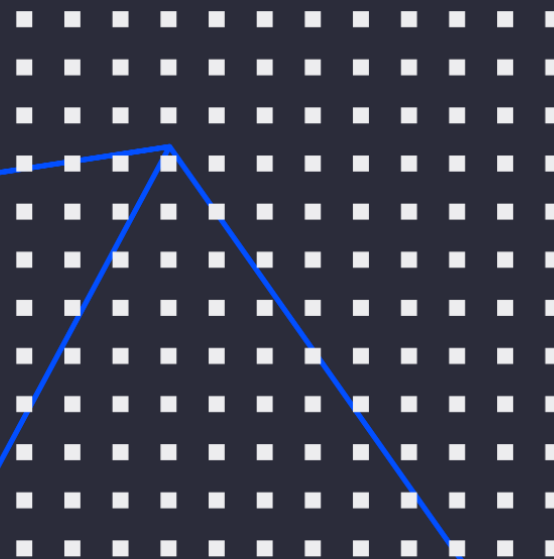
- Highlights of TecAlliance China Participation in eBay Conference in Guangzhou
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01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



China Mainland Highlight Vehicle News

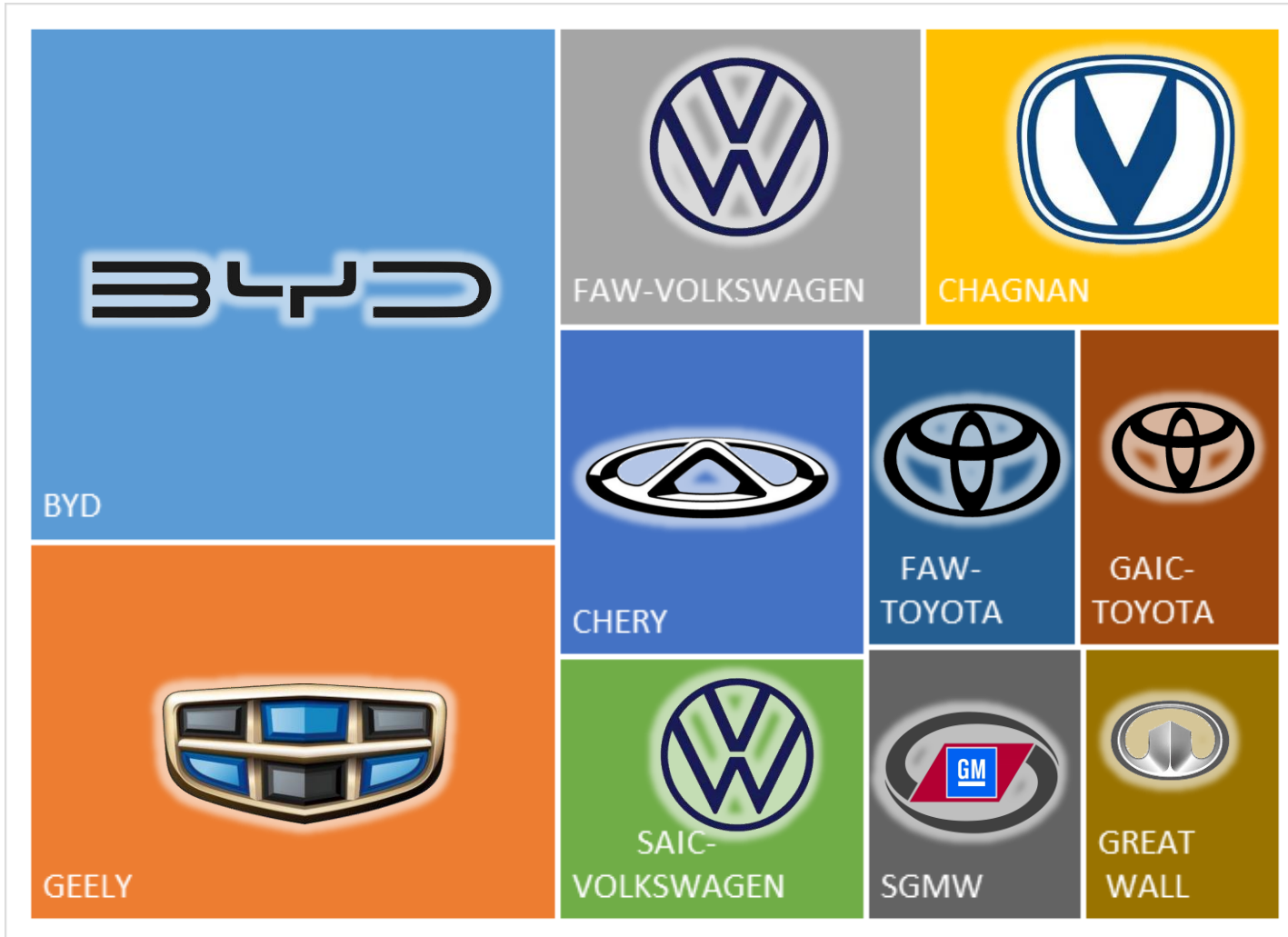
NIO enters the markets of Singapore, Uzbekistan, and Costa Rica with the national general agent.



- NIO Inc. announced that between 2025 and 2026, it will choose a national general agent cooperation model to gradually enter three markets: Singapore, Uzbekistan, and Costa Rica, further expanding its global business and bringing innovative, sustainable, high-quality smart electric mobility experiences to local users.
- In the Singapore market, NIO will collaborate with Wearnes Automotive, a leading high-end automobile group in the Asia-Pacific region, which was established in 1906 and represents and retails several luxury and high-end passenger car brands, having a strong advantage in long-term brand building and providing high-end experiences. The two parties will launch the firefly right-hand drive model in the Singapore market starting in 2026, marking NIO's first release of a right-hand drive model.
- In Costa Rica, NIO will collaborate with the country's largest electric vehicle dealer, Horizontes Cielo Azul Movilidad. This group has successful experience in taking Chinese brands from zero operations to the number one market share in the local market. This marks NIO's first expansion into the American market.
- In Uzbekistan, NIO will collaborate with the local well-known comprehensive group Abu Sahiy Motors. This company has a strong market foundation in the region, a complete logistics, real estate, and sales service network, as well as a deep understanding of the future trends in the automotive industry. This also marks NIO's first expansion into the Central Asian automotive market.
- The entry model of the national general agent will continue to uphold NIO's concept of 'user enterprise.' NIO has always strictly selected partners whose values and visions align with its own. Through mutual consensus and joint efforts, NIO will implement strict standards to create a user experience that better meets the local needs of new city users.

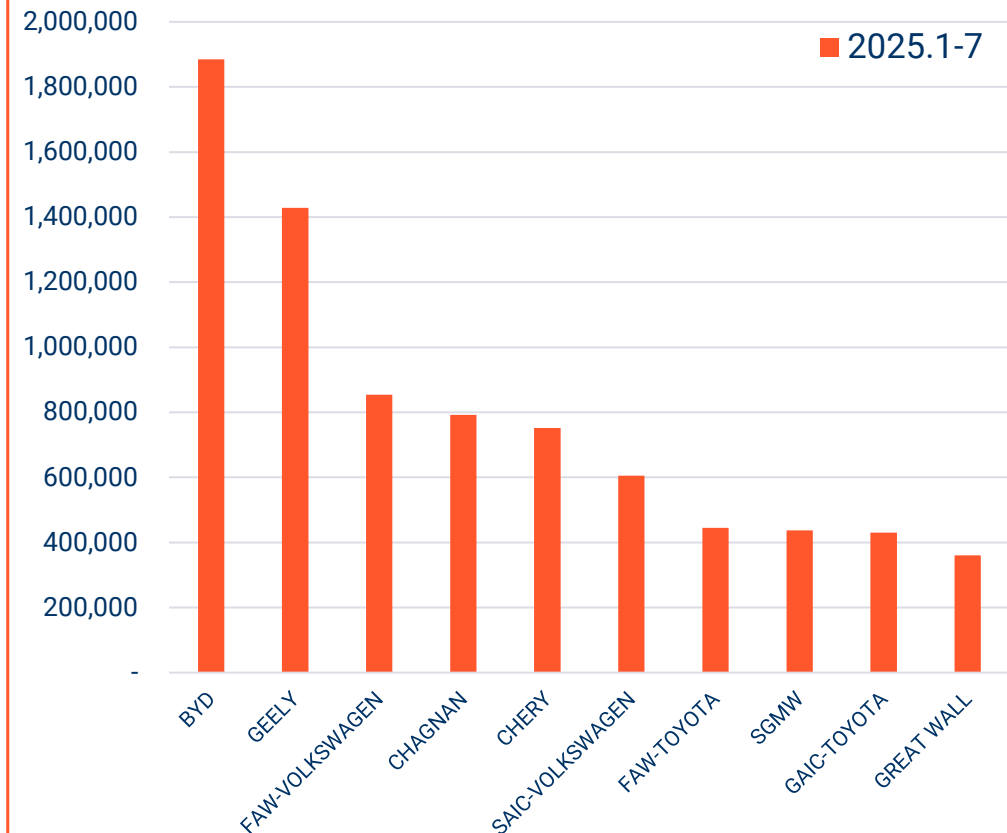
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in July 2025



Sales comparison

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

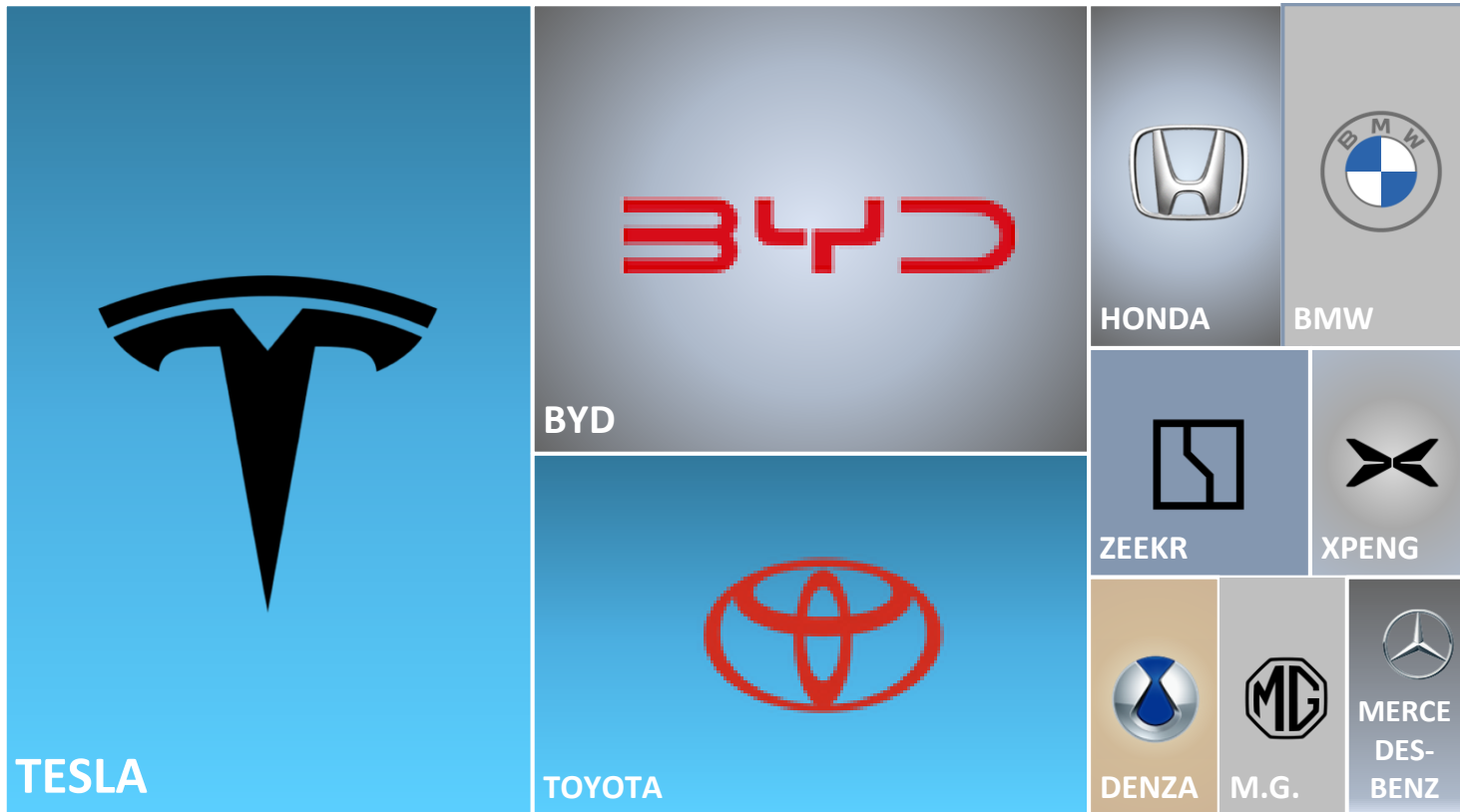


Hong Kong Highlight Vehicle News

Hong Kong May 2025 Vehicle News

Hong Kong's passenger car sales were 4,401 units in May 2025 and 3,128 units in April 2025, an increase of 40.7% month-on-month. TESLA sold 1,319 units, making it the most popular car brand in Hong Kong again.

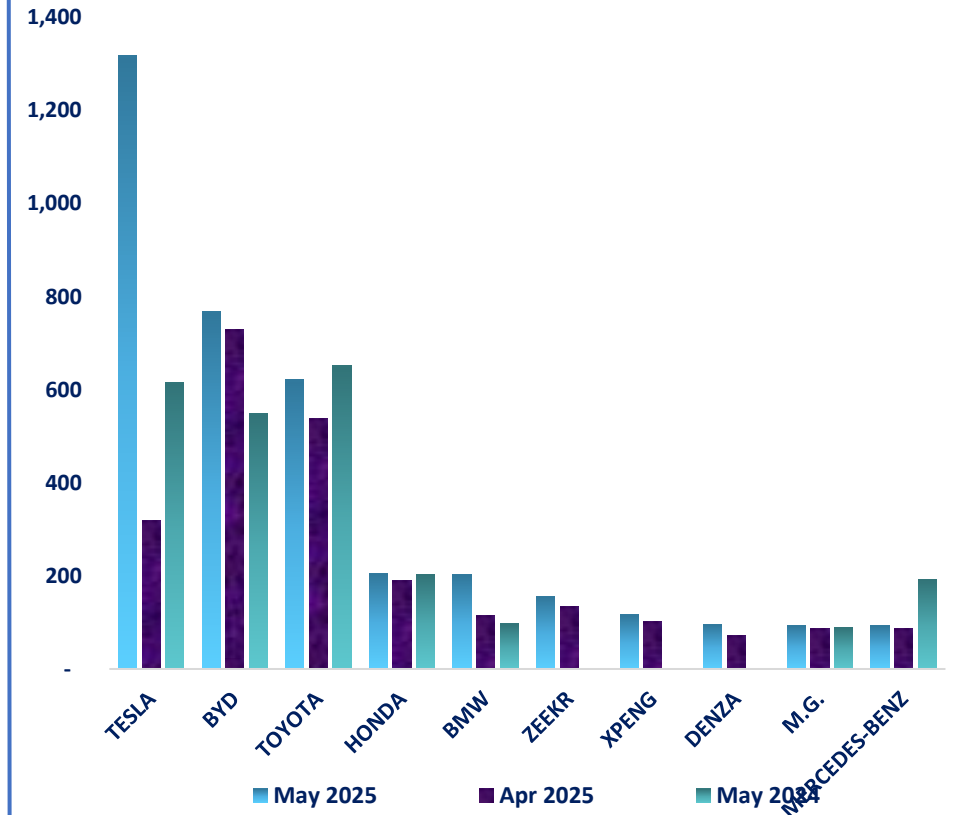
BYD ranked second with sales of 769 units, with sales increasing by 5.5% month-on-month; Toyota's sales increased by 15.4% month-on-month, ranking third; Honda's sales increased by 7.3% month-on-month, ranking fourth; BMW ranked fifth with 203 units sold. From the perspective of overall market share, 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

TESLA won the Hong Kong auto sales championship in May, with BYD ranking second with monthly sales of 769 units and Toyota ranking third with 621 units. Honda ranked 4th with 205 units, BMW ranked 5th with 203 units, and ZEEKR ranked 6th with 156 units. The seventh place is XPENG, with 116 units sold. DENZA, M.G. and Heiji, sold 96, 94 and 94 units respectively, ranking 8th and tied for 9th place.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for May 2025

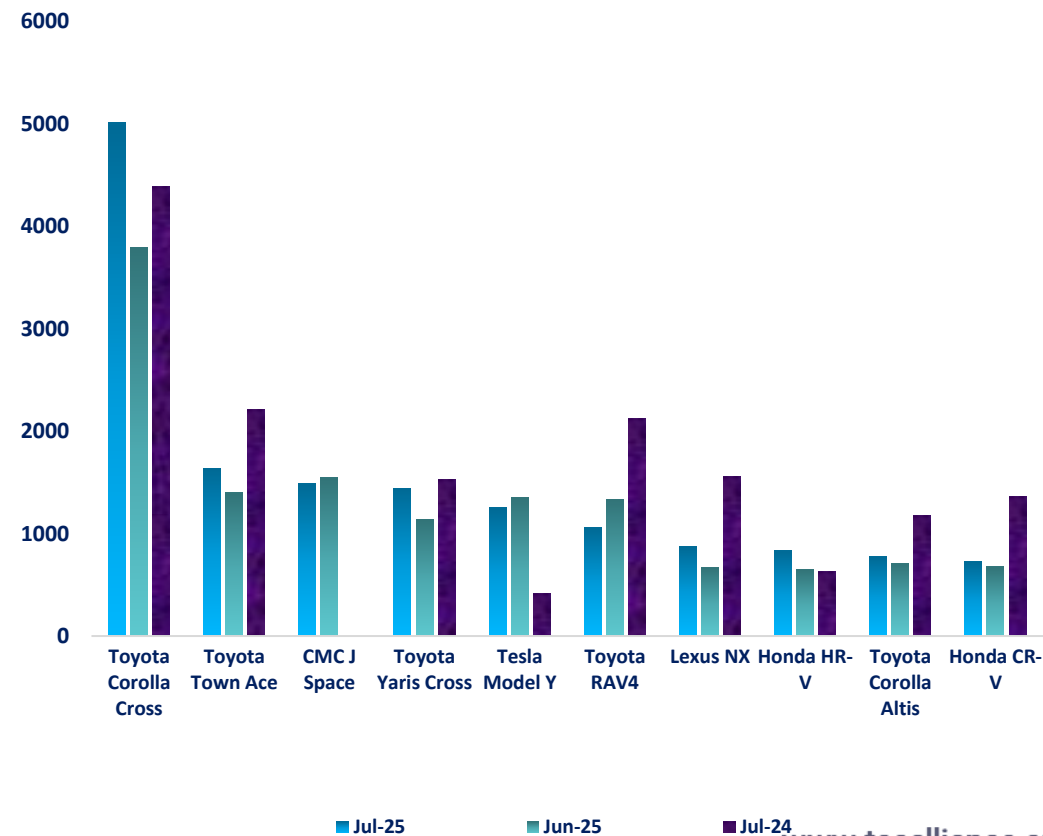


The latest wave of revised reciprocal tariffs was announced on August 1 and is expected to be officially implemented on August 7, and the follow-up effect remains to be seen. However, the new car sales data for July has been finalized, with a cumulative number of licenses issued for the whole month of 35,483 units, an increase of 3.4% compared with June, but if compared with July in the same period in 2024, there will still be a sharp decline of 22.3%.

Sale Comparison

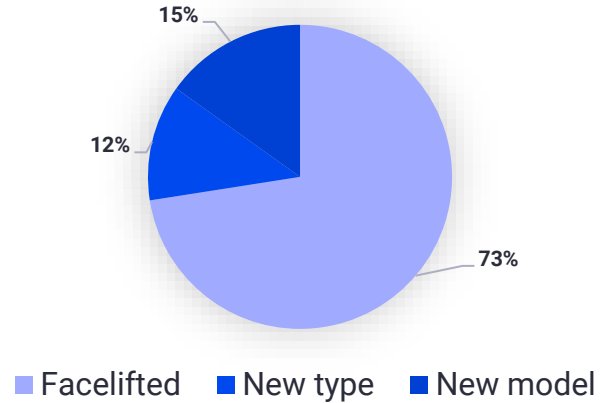
The overall new car market is underperforming

The Toyota Corolla Cross and Toyota Town Ace were the first and second runners-up in the market, with 5,010 units and 1,640 units respectively. Sales of CMC J Space fell 3.8% from June, ranking third with 1,487 units. Toyota Yaris Cross sales increased significantly from June, ranking fourth with 1,443 units. The Tesla Model Y ranked fifth with 1,253 units sold, and the Toyota RAV4 ranked sixth with 1,058 units sold. Finally, Lexus NX, Honda HR-V, Toyota Corolla Altis and Honda CR-V ranked seventh, eighth, ninth and tenth with 877 units, 833 units, 775 units and 728 units respectively.

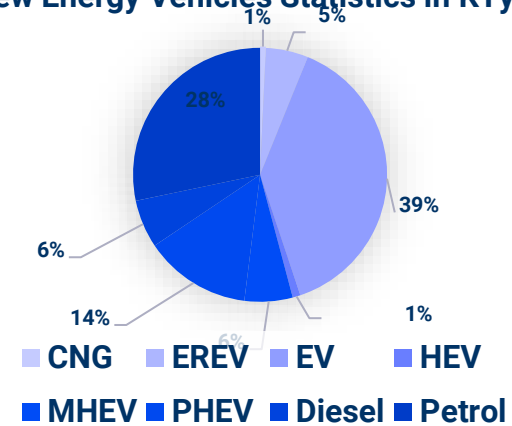


China JAN-JUL New Vehicle Analysis

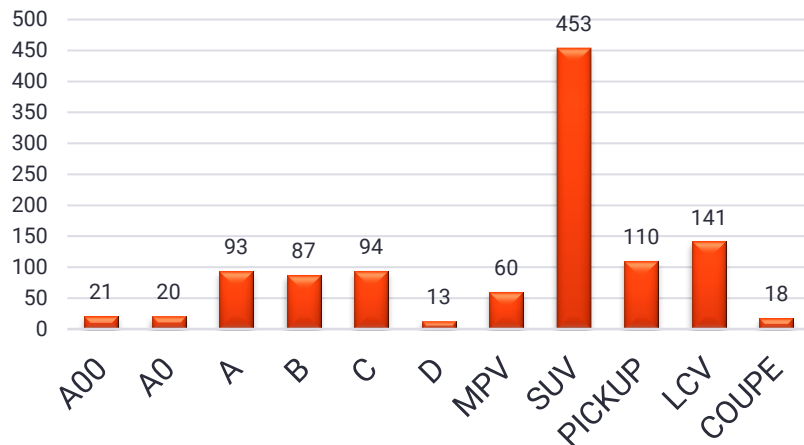
New vehicle statistics in KType



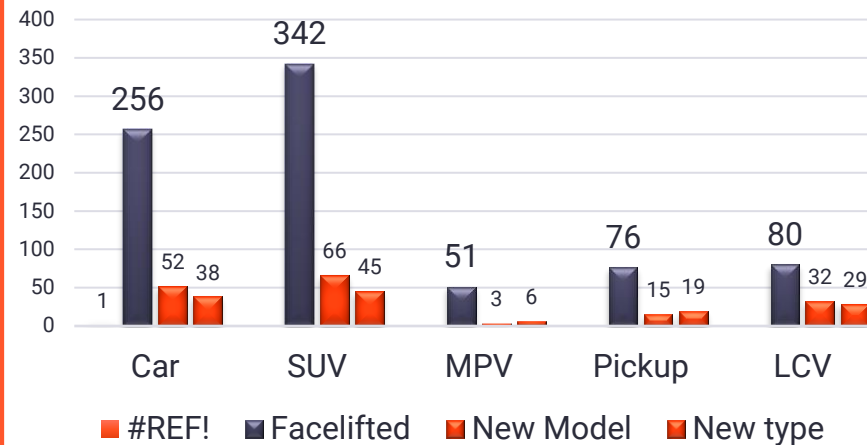
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to July 2025**, the total coverage of **K-Type** was **1110**, of which **305** 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	68	31	FARIZON AUTO	10	61	KIA (DYK)	6	92	YUFENG	3	121	SUBARU	2
2	JETOUR	38	32	ISUZU (JIANGXI)	9	62	JEEP	6	93	VOLVO	3	122	TESLA	2
3	MERCEDES-BENZ	36	33	JINBEI	9	63	LIXIANG	6	94	ZEEKR	3	123	INFINITI (DFAC)	2
4	CHANA	36	34	FOTON	9	64	ISUZU (QINGLING)	6	95	MAEXTRO	3	124	ONVO	2
5	VW (FAW)	34	35	BESTUNE	9	65	LANDIAN	5	96	CITROËN (DF-PSA)	3	125	LIVAN AUTO	1
6	CHERY	34	36	GAC	9	66	AITO	5	97	ORA	3	126	MERCEDES-BENZ (FJDA)	1
7	CHANGAN	34	37	NEW BAOJUN	9	67	GREAT WALL	5	98	BAIC	2	127	LETIN	1
8	MAXUS	33	38	XPENG	9	68	HYPER	5	99	TOYOTA	2	128	VGX	1
9	DONGFENG (DFAC)	26	39	ARCFOX	9	69	MAZDA (CHANGAN)	5	100	RCEV	2	129	MAPLE	1
10	JAC	25	40	VOLVO ASIA	9	70	R AUTO	5	101	NAMMI	2	130	MINI	1
11	HONGQI	23	41	ROEWE (SAIC)	8	71	TESLA	5	102	VICTORY	2	131	BENTLEY	1
12	EXEED (CHERY)	20	42	GALAXY	8	72	i CAR	4	103	DENZA	2	132	SMART	1
13	FENGXING	19	43	NISSAN (DFAC)	8	73	PEUGEOT (DF-PSA)	4	104	NEOMOR	2	133	MASERATI	1
14	SKYWORTH	17	44	IM MOTORS	8	74	JMEV	4	105	REFINE	2	134	OSHAN	1
15	er	16	45	LYNK & CO	8	75	LOTUS	4	106	TOYOTA (FAW)	2	135	LAMBORGHINI	1
16	LEAPMOTOR	16	46	TOYOTA (GAC)	7	76	SINOTRUK (CNHTC)	4	107	TESLA	2	136	VW	1
17	AEOLUS	14	47	LINXYS	7	77	VOYAH	4	108	FANGCHENGBAO	2	137	STELATO	1
18	JMC	14	48	BMW (BRILLIANCE)	7	78	KARRY	4	109	LEVC	2	138	AITO	1
19	DEEPAL	14	49	GAC NE	7	79	XIAOMI	4	110	YANGWANG	2	139	ROLLS-ROYCE	1
20	AVATR	14	50	BUICK (SGM)	7	80	HONDA (DONGFENG)	4	111	BMW	2	140	LINCOLN (CHANGAN)	1
21	VW (SVW)	14	51	HAVAL	7	81	CADILLAC (SGM)	4	112	CAVAN	2	141	FIREFLY	1
22	MERCEDES-BENZ (BBDC)	13	52	PORSCHE	7	82	JAC EV	4	113	MINI	2	142	SUZUKI	1
23	AUDI (FAW)	12	53	HONDA (GAC)	7	83	NISSAN (ZHENGZHOU)	4	114	LUXEED	2	143	JAGUAR (CHERY)	1
24	SRM (BRILLIANCE)	12	54	MG (SAIC)	7	84	BAIC-ORV	4	115	ZD	2	144	LINGBOX	1
25	WULING (SGMW)	12	55	NIO	7	85	SMART	4	116	VW (ANHUI)	2	145	SWM MOTORS	1
26	NAC IVECO (NAVECO)	11	56	TANK	6	86	AUDI (SAIC)	4	117	M-HERO	2	146	KTM	1
27	COWIN	11	57	QIYUAN	6	87	GENESIS	4	118	FENGON	2	147	HEDMOS	1
28	GEELY	11	58	BAW	6	88	YE	4	119	WEY	2	148	FORD (CHANGAN)	1
29	FORD (JMC)	10	59	AUDI	6	89	JETTA	3	120	POLESTAR	2	149	FERRARI	1
30	RADAR	10	60	LAND ROVER	6	90	VENUCIA	3		JUNEYAO	2	150	ALFA ROMEO	1
												151	DONGFENG XIAOKANG	1

Remarks:
 All statistical data is based on K-Type. From **January to July 2025**, the total coverage of **K-Type** was **1110**, of which **305** were **New K-Type**.
www.tecalliance.cn

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

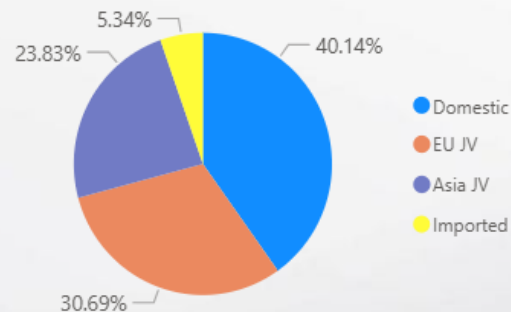
EU JOINT VENTURE CAR

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

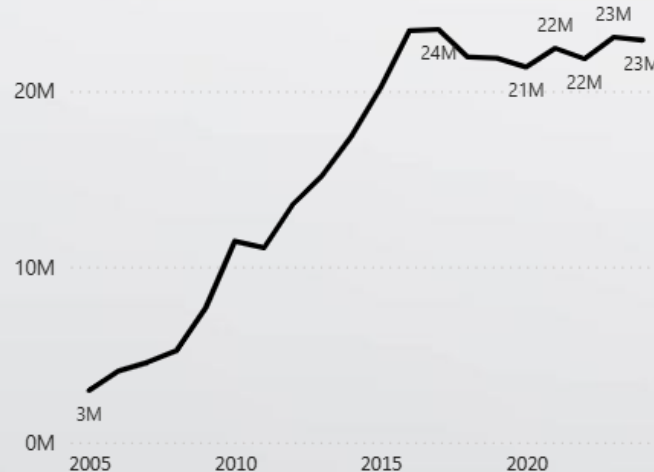
VIO OF TOP 1 VEHICLE

1,811,613

POPULATION SHARE

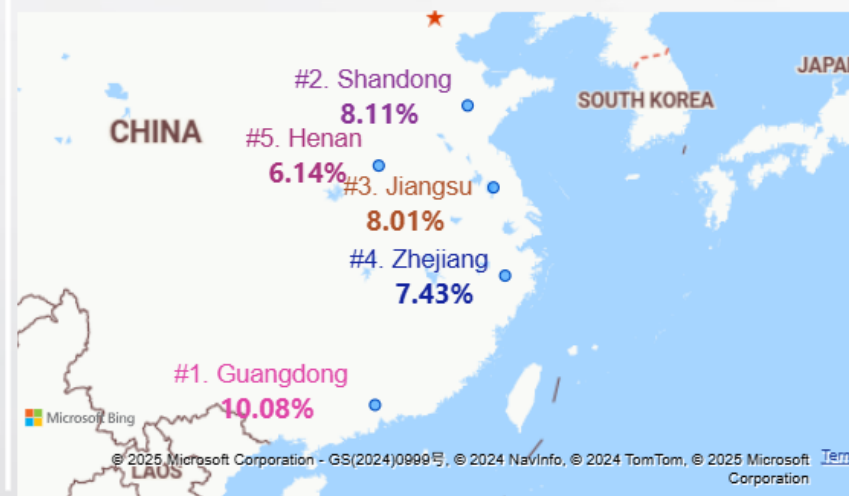
0.57%

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 EU Vehicle Brands
Researched | YTD 2025

1036

Generic Articles of EU Vehicle
Brands Researched | YTD 2025

223

OE Numbers of EU Vehicle
Brands Researched | YTD 2025

42K

EU Vehicle Brands
Covered | YTD 2025

38

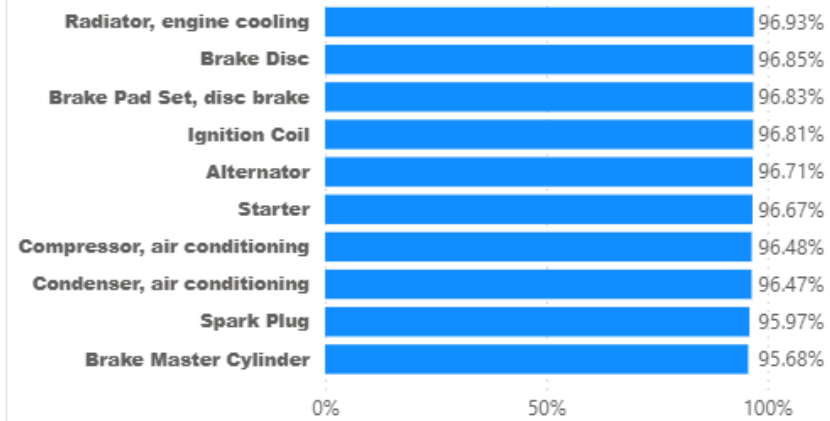
CHINA ▾

2025 ▾

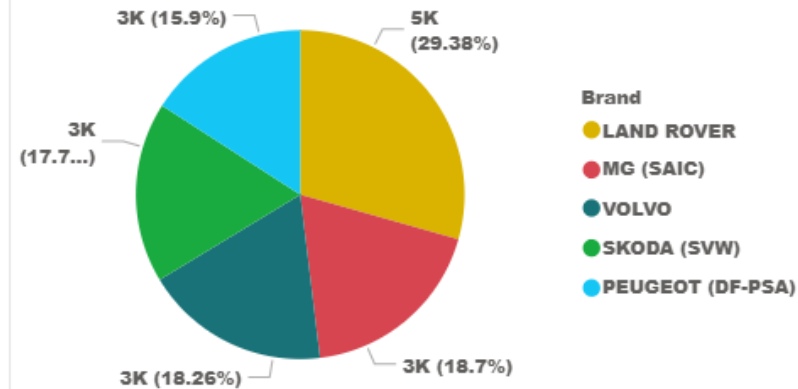
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Top 10 Generic Articles by Coverage (EU Vehicle Brands)

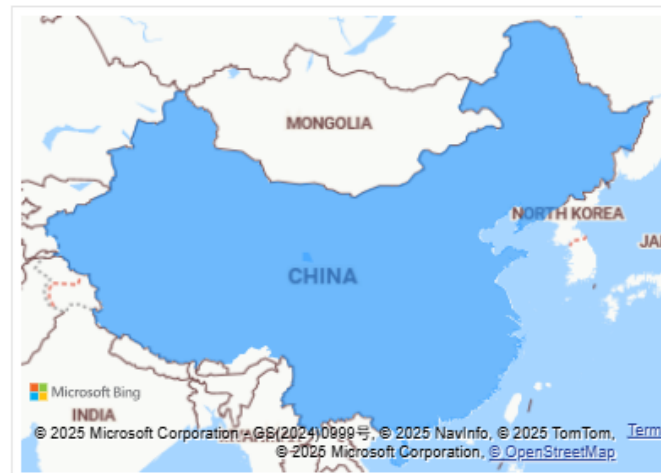


Top 5 EU Vehicle Brands by OE

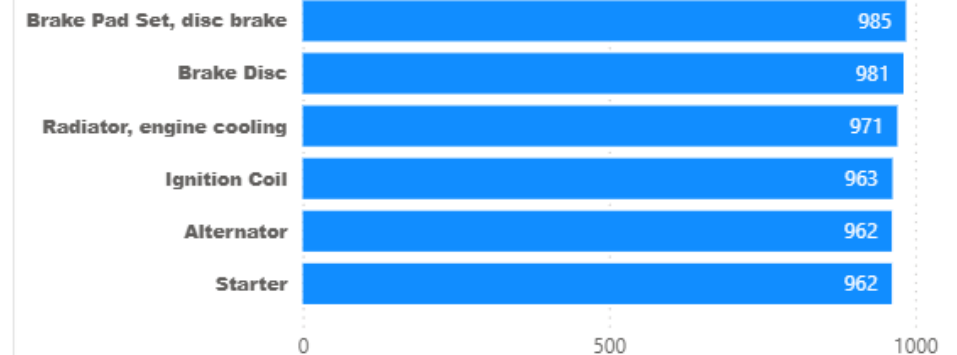


Total OE numbers of Land Rover

4965



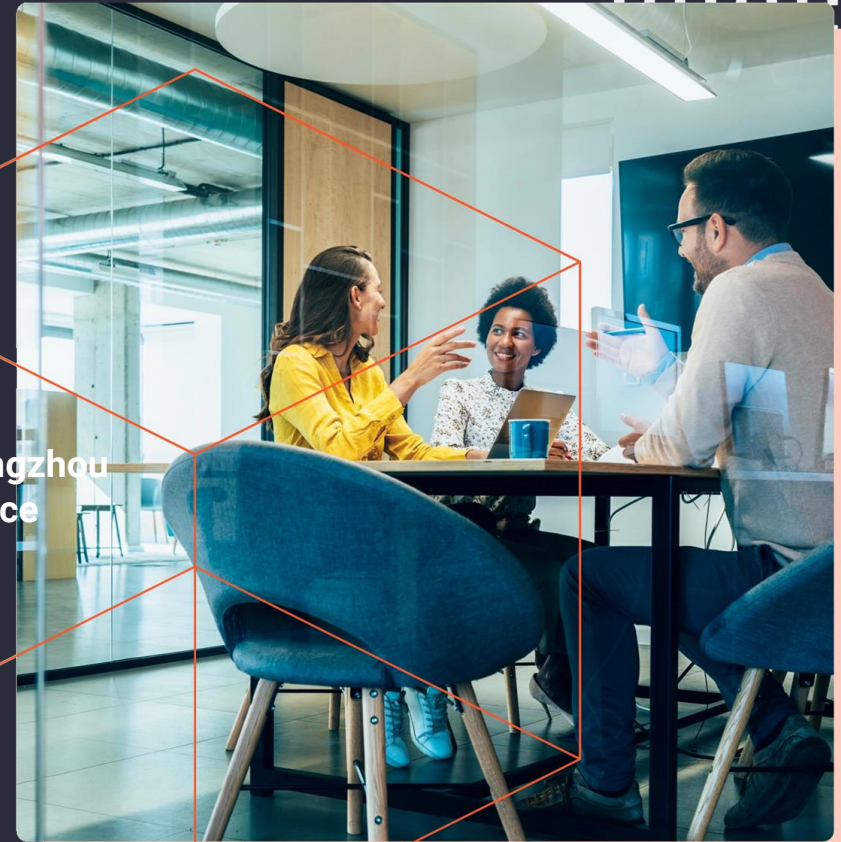
Top 5 Generic Articles by K-Types (EU Vehicle Brands)



03

Company News

- Highlights of TecAlliance China Participation in eBay Conference in Guangzhou
- Highlights of TecAlliance China Participation in NEXUS Partner Conference in Chongqing
- 2025 China Marketing Communication Roadmap



Highlights of TecAlliance China Participation in eBay Conference in Guangzhou



On July 2, TecAlliance China was invited to attend eBay's "Embark on a New Journey, Win the Future" Online European Automotive Parts Market Development Conference. During the event, TecAlliance shared key data insights into the European automotive aftermarket and, for the first time, introduced a smart vehicle model query tool jointly developed with eBay China, which attracted widespread attention among the eBay sellers present.

- In-depth Analysis of the European Market to Help Seize Business Opportunities

As a global automotive aftermarket data service provider with over 30 years of experience, TecAlliance China systematically presented data of VIO, vehicle age distribution, and mainstream models across multiple European countries. The company also introduced its data resources and analytical capabilities regarding popular product lines in Europe, helping eBay sellers gain a comprehensive understanding of the European market landscape and identify high-potential products and category opportunities.

- Smart Tools to Enhance Operational Efficiency and Coverage Accuracy

To help eBay sellers improve product listing efficiency and maximize product compatibility, TecAlliance China and eBay are collaborating on an intelligent vehicle matching and listing assistance tool. Leveraging TecAlliance's extensive European vehicle database, the tool can automatically identify additional compatible vehicle models for individual products and provide key data such as VIO in corresponding markets. This initiative will significantly enhance the accuracy and efficiency of product listings, reduce operational complexity for sellers, and enable more precise and efficient cross-border business expansion.

Highlights of TecAlliance China Participation in NEXUS Partner Conference in Chongqing



On July 4, TecAlliance China was invited to attend the Nexus "Gathering Momentum, Meeting the Future in Chongqing" N!CD Partner Conference. At the event, TecAlliance China shared its "Global Standardization" operational philosophy and officially launched several new products jointly developed with Nexus, which garnered extensive attention and high recognition from the attendees.

- Launch of Nexus Member-Exclusive Warranty System to Improve Efficiency

To optimize the after-sales process for automotive parts transactions,

TecAlliance China and Nexus collaborated to develop a dedicated warranty system software. Tailored and functionally optimized to meet the practical needs of the Chinese automotive parts market, the system significantly simplifies after-sales services for parts, effectively enhancing operational efficiency and user experience.

- Initiation of Chinese Vehicle OEM Data Project to Seize Global Opportunities

In response to the market opportunities brought by "Chinese automakers going global,"

TecAlliance China and Nexus jointly launched the "Chinese Vehicle OEM Data Project." Leveraging TecAlliance's mature data framework and global resources, the project aims to provide partners with comprehensive and accurate data support for Chinese vehicle models, strengthening their data competitiveness in the global market and helping them seize business opportunities and expand overseas operations.



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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