

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version June 2025

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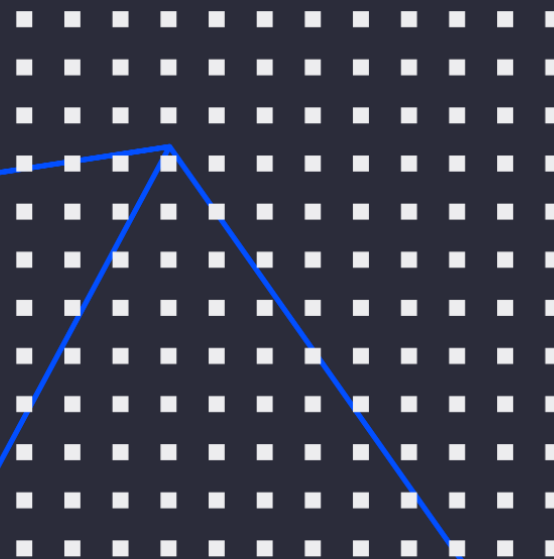
- Highlights of TecAlliance China Customer Training Workshop in Guangzhou
- 2025 China Marketing Communication Roadmap



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



China Mainland Highlight Vehicle News

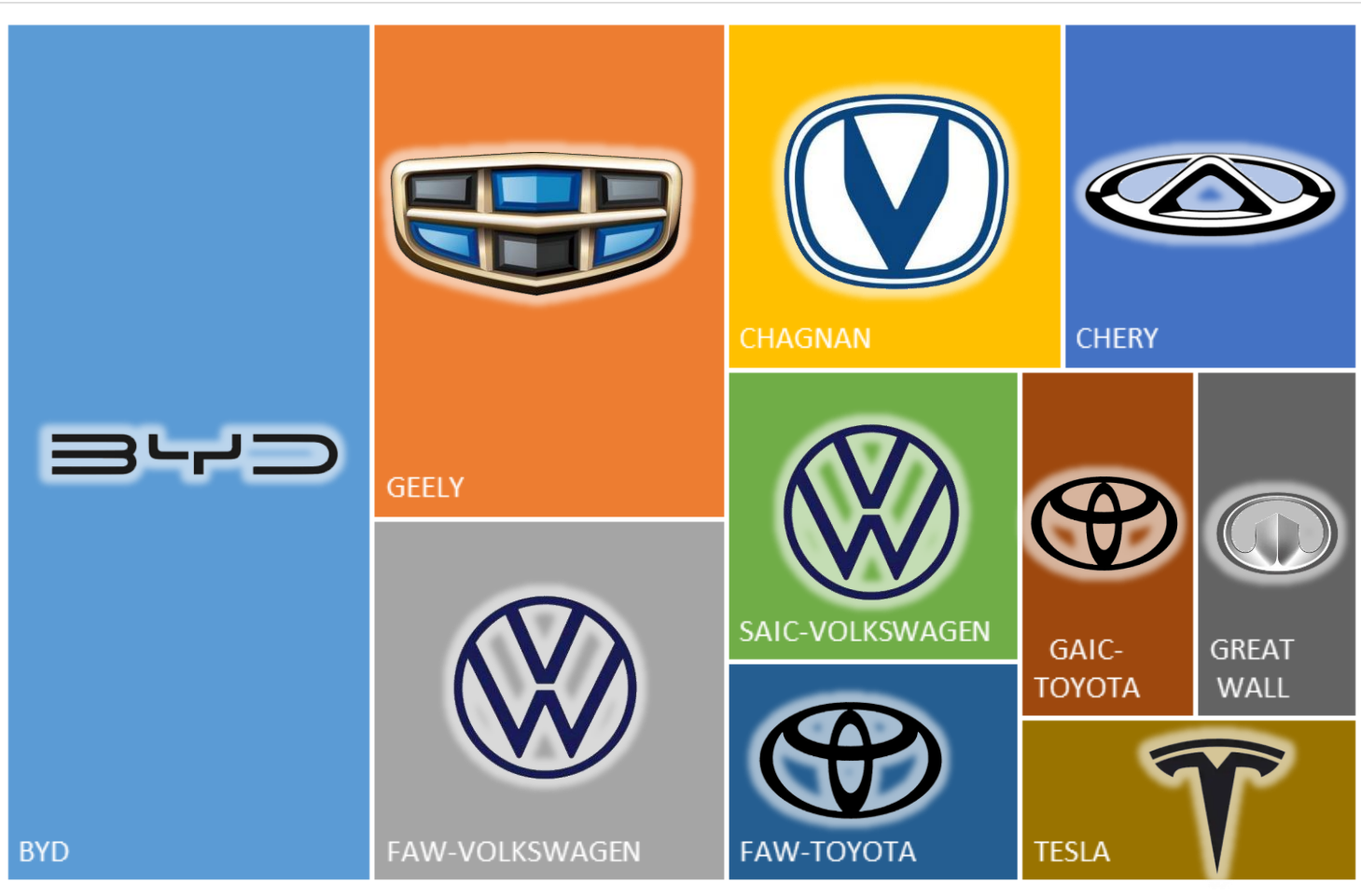
Plug-in hybrid / pure electric range may reach 200km. The all-new Volvo XC70 will start pre-sales in August.



- The all-new Volvo XC70 will begin pre-sales in August. This new vehicle is the first car built on the SMA architecture, positioned as a mid-size SUV, and will adopt a plug-in hybrid power system. After its launch, it will fill the product gap between the 60 series and 90 series SUV models. According to the plan, the new car is expected to officially launch in September.
- Currently, the official release has shown the new car color official images. It can be observed that the overall shape of the vehicle follows Volvo's electrification design philosophy. The front end is equipped with a closed front grille and the currently popular split headlight design, with the LED daytime running lights still maintaining the Thor's Hammer style. In addition, the new vehicle's lower surround will also be equipped with an active grille, which can help with quick warm-up and battery cooling, among other functions.
- The side features a hidden water-cut design, equipped with frameless doors and hidden door handles. The multiple character lines enhance the three-dimensional aspect of the car's side. In terms of dimensions, the car measures 4815/1890/1650mm in length, width, and height, respectively, with a wheelbase of 2895mm, and wheel options of R19 and R20 available. Additionally, the new car will come in a brand-new shade of Xiaqiao gray. Moving to the rear, the tail design adds a sense of weight, with taillights continuing the classic vertical layout of Volvo, and the brand's English logo is embedded in the center of the trunk, providing strong recognition.
- In terms of power, the new car will be equipped with a plug-in hybrid system consisting of a 1.5T engine and an electric motor, with the engine delivering a maximum power of 120kW. The power battery will offer both lithium iron phosphate and ternary lithium batteries, and based on previous information, the vehicle's pure electric range can reach 200 kilometers.

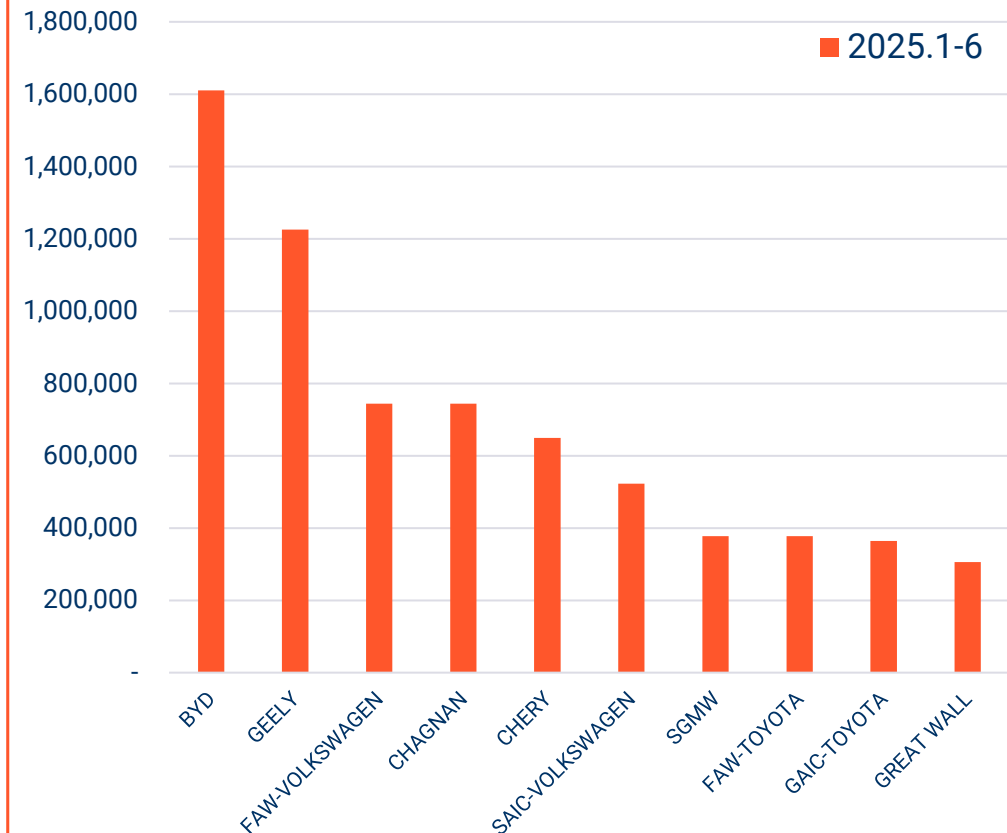
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in June 2025



Sales comparison

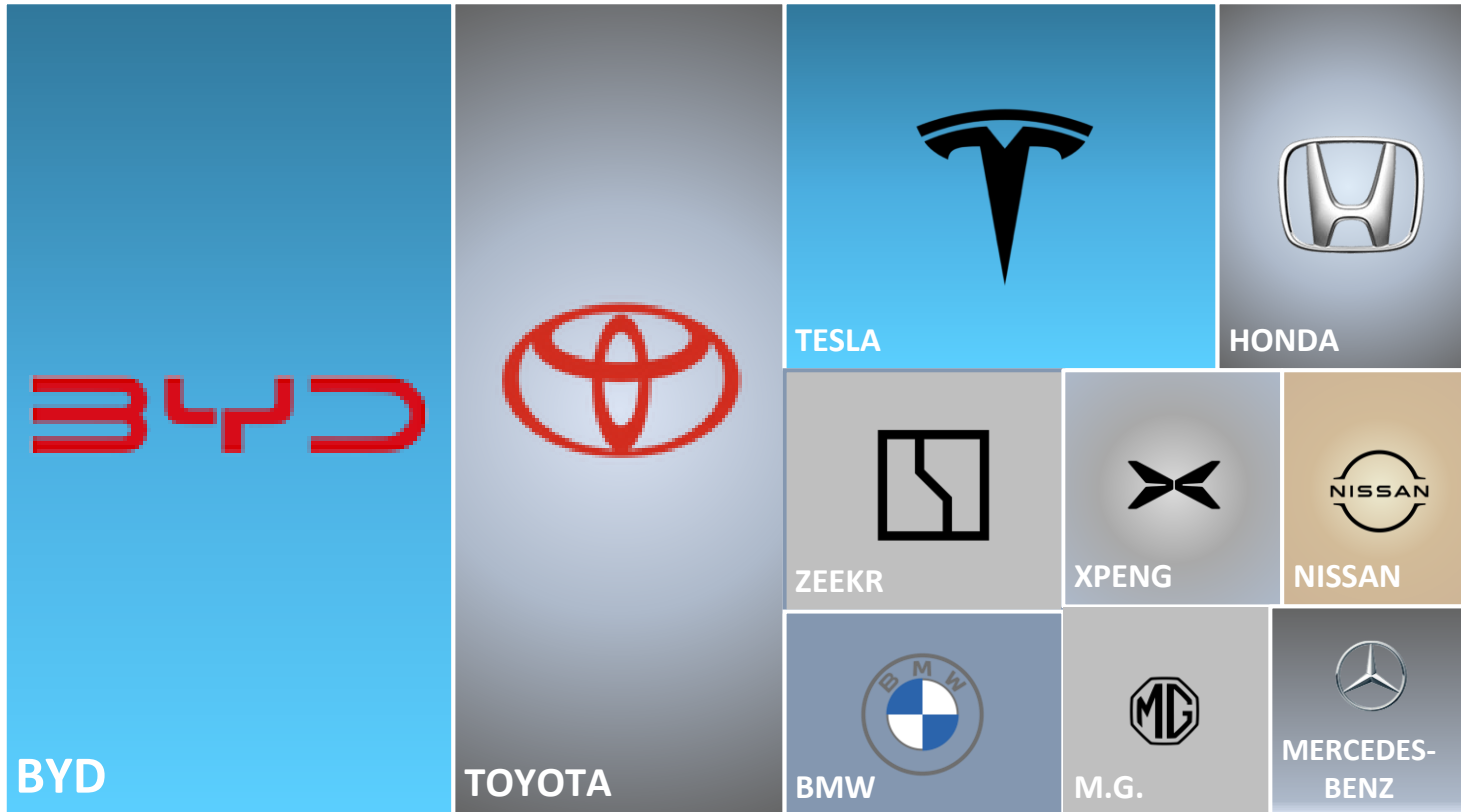
From January to June, BYD's sales are ahead of other brands.



Hong Kong Highlight Vehicle News

Hong Kong April 2025 Vehicle News

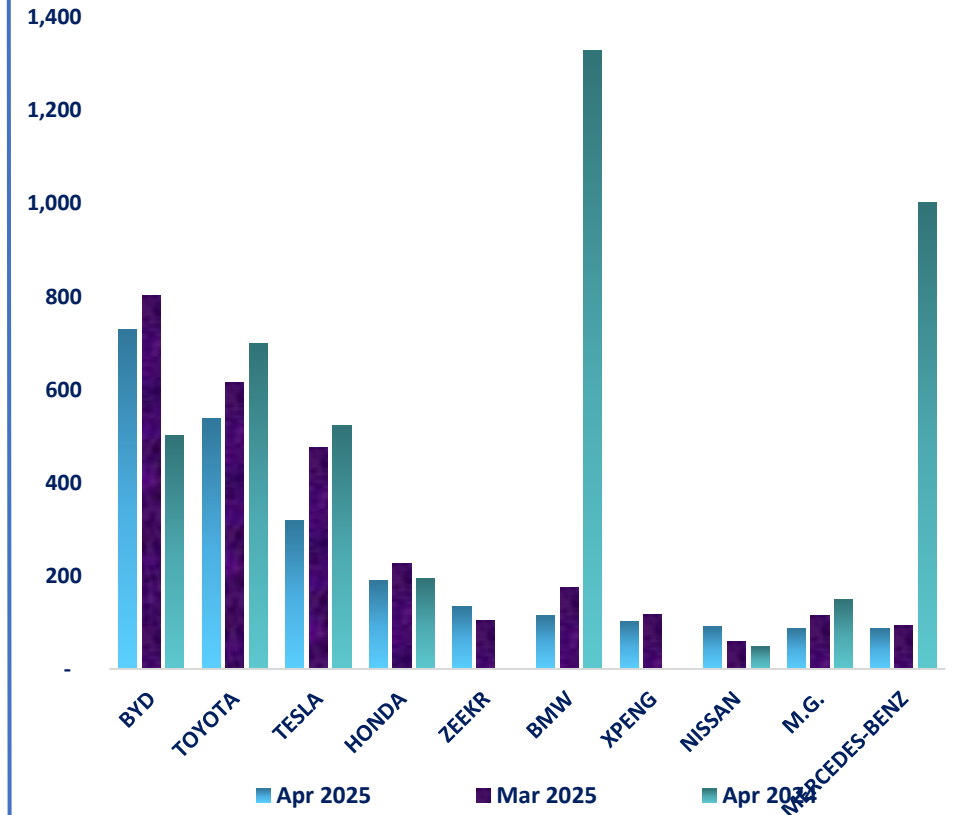
Hong Kong's passenger car sales were 3,128 units in April 2025 and 3,622 units in March 2025, down 13.6% month-on-month. With sales of 729 units, BYD continues to be the most popular car brand in Hong Kong. Toyota ranked second with sales of 538 units, down 12.7% month-on-month; TESLA sales fell 33.1% month-on-month, ranking third; Honda's sales fell 15.5% month-on-month, ranking fourth; ZEEKR ranked fifth with 134 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

The top car sales in Hong Kong continued to be won by BYD in April, with Toyota ranking second with monthly sales of 538 units and TESLA ranking third with 318 units. Honda is in 4th place with 191 units, ZEEKR is in 5th place with 134 units, and BMW is in 6th place with 114 units. The 7th place is XPENG, with 103 units sold. Nissan, M.G. and Mercedes-Benz sold 92, 87 and 87 units, respectively, ranking 8th, 9th and 10th.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for May 2025

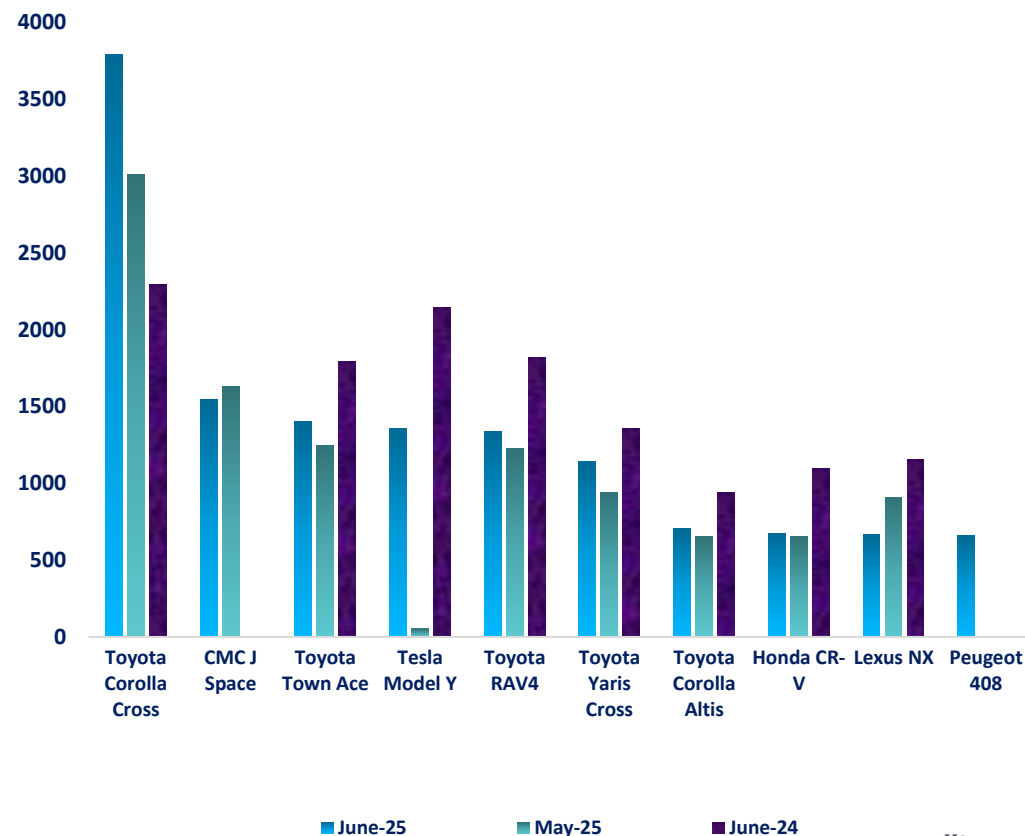


Before the results of trade and reciprocal tariff negotiations between Taiwan and the United States were released, Taiwan's new car sales market was still dominated by a wait-and-see atmosphere, and consumers were expecting tariff or excise tax reductions, resulting in a significant delay in their willingness to purchase or deliver cars, which is reflected in Taiwan's new car sales data. In the second half of the year, the cumulative sales scale from January to June 2025 was only 198,967 units, failing to cross the 20 million mark, and compared to the same period in the first half of 2024, there was a decline of up to 14.4%.

■ Sale Comparison

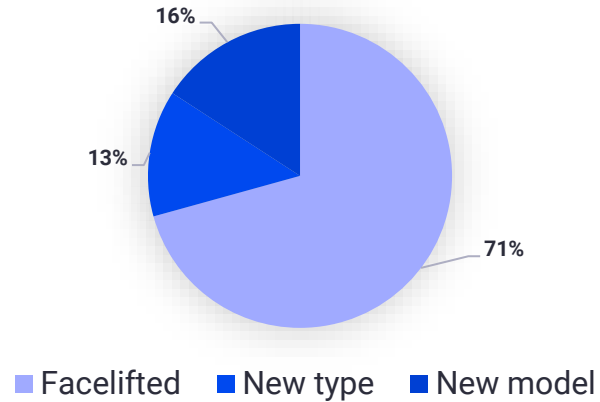
The overall new car market is not optimistic

Toyota Corolla Cross and Zhonghua J Space stood at the top of the market as champions and runners-up respectively, with 3,794 units and 1,545 vehicles in order. Toyota Town Ace sales increased by 12.1% from May, ranking third with 1,400 units. Tesla Model Y sales increased significantly from May, ranking fourth with 1,357 units. The Toyota RAV4 ranked fifth with 1,336 units sold, while the Toyota Yaris Cross ranked sixth with 1,139 units sold. Finally, the Toyota Corolla Altis, Honda CR-V, Lexus NX, and Peugeot 408 ranked seventh, eighth, ninth, and tenth with 706, 676, 669, and 660 units, respectively.

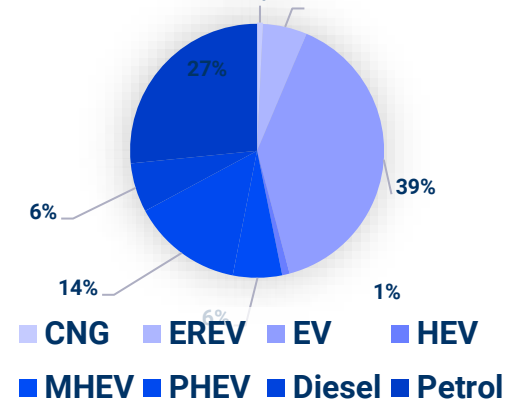


China JAN-JUNE New Vehicle Analysis

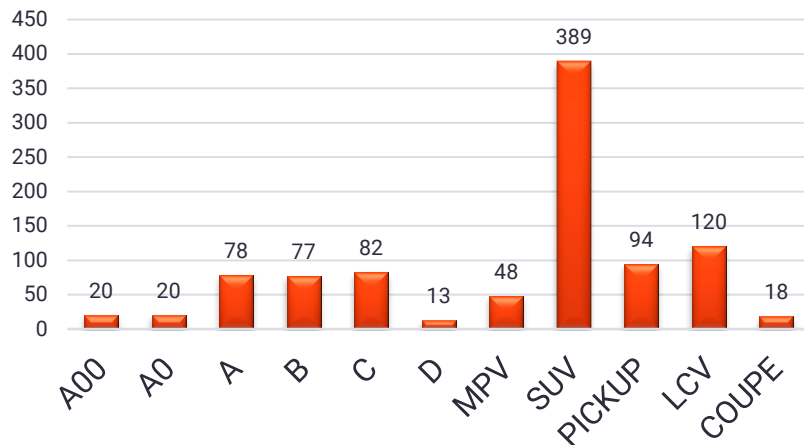
New vehicle statistics in KType



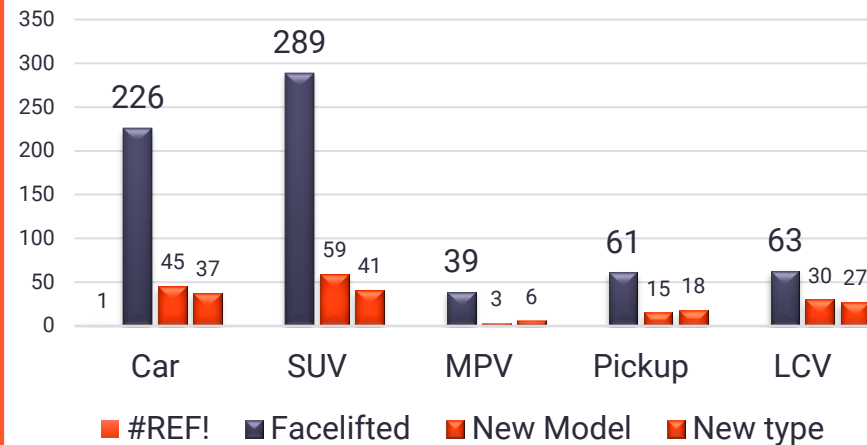
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to June 2025**, the total coverage of **K-Type** was **959**, of which **281** 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 | 62 |
| 2 | CHANA | 34 |
| 3 | CHANGAN | 33 |
| 4 | VW (FAW) | 32 |
| 5 | CHERY | 32 |
| 6 | MAXUS | 30 |
| 7 | JETOUR | 30 |
| 8 | MERCEDES-BENZ | 27 |
| 9 | HONGQI | 23 |
| 10 | EXEED (CHERY) | 20 |
| 11 | JAC | 18 |
| 12 | DONGFENG (DFAC) | 17 |
| 13 | erπ | 14 |
| 14 | VW (SVW) | 14 |
| 15 | JMC | 14 |
| 16 | DEEPAL | 14 |
| 17 | AVATR | 14 |
| 18 | AEOLUS | 14 |
| 19 | MERCEDES-BENZ (BBDC) | 13 |
| 20 | SRM (BRILLIANCE) | 12 |
| 21 | SKYWORTH | 12 |
| 22 | AUDI (FAW) | 12 |
| 23 | COWIN | 11 |
| 24 | NAC IVECO (NAVECO) | 11 |
| 25 | LEAPMOTOR | 11 |
| 26 | FORD (JMC) | 10 |
| 27 | RADAR | 10 |
| 28 | FENGXING | 9 |
| 29 | ISUZU (JIANGXI) | 9 |
| 30 | ARCFOX | 9 |

| # | Brand | Total |
|----|------------------|-------|
| 31 | FOTON | 9 |
| 32 | BESTUNE | 8 |
| 33 | WULING (SGMW) | 8 |
| 34 | GEELY | 8 |
| 35 | XPENG | 8 |
| 36 | IM MOTORS | 8 |
| 37 | BUICK (SGM) | 7 |
| 38 | GALAXY | 7 |
| 39 | MG (SAIC) | 7 |
| 40 | BMW (BRILLIANCE) | 7 |
| 41 | HONDA (GAC) | 7 |
| 42 | FARIZON AUTO | 7 |
| 43 | LYNK & CO | 7 |
| 44 | BAW | 6 |
| 45 | TANK | 6 |
| 46 | AUDI | 6 |
| 47 | GAC | 6 |
| 48 | GAC NE | 6 |
| 49 | ISUZU (QINGLING) | 6 |
| 50 | NISSAN (DFAC) | 6 |
| 51 | VOLVO ASIA | 6 |
| 52 | ROEWE (SAIC) | 6 |
| 53 | QIYUAN | 6 |
| 54 | AITO | 5 |
| 55 | HAVAL | 5 |
| 56 | NEW BAOJUN | 5 |
| 57 | LIXIANG | 5 |
| 58 | LINXYS | 5 |
| 59 | LANDIAN | 5 |
| 60 | LAND ROVER | 5 |

| # | Brand | Total |
|----|--------------------|-------|
| 61 | GREAT WALL | 5 |
| 62 | R AUTO | 5 |
| 63 | i CAR | 4 |
| 64 | SINOTRUK (CNHTC) | 4 |
| 65 | TOYOTA (GAC) | 4 |
| 66 | PORSCHE | 4 |
| 67 | CADILLAC (SGM) | 4 |
| 68 | AUDI (SAIC) | 4 |
| 69 | XIAOMI | 4 |
| 70 | KARRY | 4 |
| 71 | GENESIS | 4 |
| 72 | HONDA (DONGFENG) | 4 |
| 73 | PEUGEOT (DF-PSA) | 4 |
| 74 | JAC EV | 4 |
| 75 | JMEV | 4 |
| 76 | YE | 4 |
| 77 | NIO | 4 |
| 78 | KIA (DYK) | 4 |
| 79 | LOTUS | 4 |
| 80 | YUFENG | 3 |
| 81 | JEEP | 3 |
| 82 | MAEXTRO | 3 |
| 83 | NISSAN (ZHENGZHOU) | 3 |
| 84 | ZEEKR | 3 |
| 85 | ORA | 3 |
| 86 | VOLVO | 3 |
| 87 | TESLA | 3 |
| 88 | CITROËN (DF-PSA) | 3 |
| 89 | MAZDA (CHANGAN) | 3 |
| 90 | LEVC | 2 |

| # | Brand | Total |
|-----|--------------|-------|
| 91 | SMART | 2 |
| 92 | NAMMI | 2 |
| 93 | TOYOTA (FAW) | 2 |
| 94 | TOYOTA | 2 |
| 95 | YANGWANG | 2 |
| 96 | BAIC-ORV | 2 |
| 97 | CAVAN | 2 |
| 98 | JUNEYAO AUTO | 2 |
| 99 | VW (ANHUI) | 2 |
| 100 | NEOMOR | 2 |
| 101 | BMW | 2 |
| 102 | VOYAH | 2 |
| 103 | VICTORY | 2 |
| 104 | JETTA | 2 |
| 105 | FANGCHENGBAO | 2 |
| 106 | HYPER | 2 |
| 107 | LUXEED | 2 |
| 108 | POLESTAR | 2 |
| 109 | TESLA | 2 |
| 110 | M-HERO | 2 |
| 111 | REFINE | 2 |
| 112 | RCEV | 2 |
| 113 | ZD | 2 |
| 114 | DENZA | 2 |
| 115 | MINI | 2 |
| 116 | JINBEI | 2 |
| 117 | FENGON | 2 |
| 118 | WEY | 2 |
| 119 | KTM | 1 |
| 120 | SMART | 1 |

| # | Brand | Total |
|-----|----------------------|-------|
| 121 | VGX | 1 |
| 122 | STELATO | 1 |
| 123 | LAMBORGHINI | 1 |
| 124 | LINGBOX | 1 |
| 125 | ROLLS-ROYCE | 1 |
| 126 | BAIC | 1 |
| 127 | VENUCIA | 1 |
| 128 | VW | 1 |
| 129 | MERCEDES-BENZ (FJDA) | 1 |
| 130 | BENTLEY | 1 |
| 131 | JAGUAR (CHERY) | 1 |
| 132 | SWM MOTORS | 1 |
| 133 | SUBARU | 1 |
| 134 | LINCOLN (CHANGAN) | 1 |
| 135 | MAPLE | 1 |
| 136 | FERRARI | 1 |
| 137 | MASERATI | 1 |
| 138 | LIVAN AUTO | 1 |
| 139 | HEDMOS | 1 |
| 140 | FORD (CHANGAN) | 1 |
| 141 | FIREFLY | 1 |
| 142 | MINI | 1 |
| 143 | SUZUKI | 1 |
| 144 | OSHAN | 1 |
| 145 | AITO | 1 |
| 146 | ALFA ROMEO | 1 |
| 147 | LETIN | 1 |

Remarks:
All statistical data is based on K-Type. From **January to June 2025**, the total coverage of **K-Type** was **959**, of which **281** 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

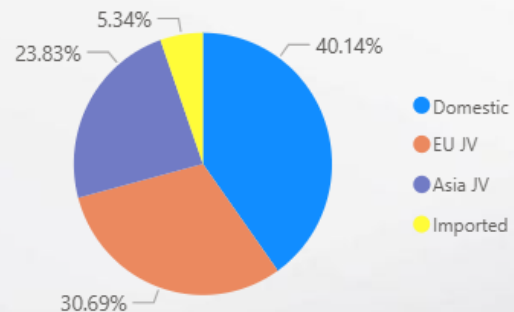
EU JOINT VENTURE CAR

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

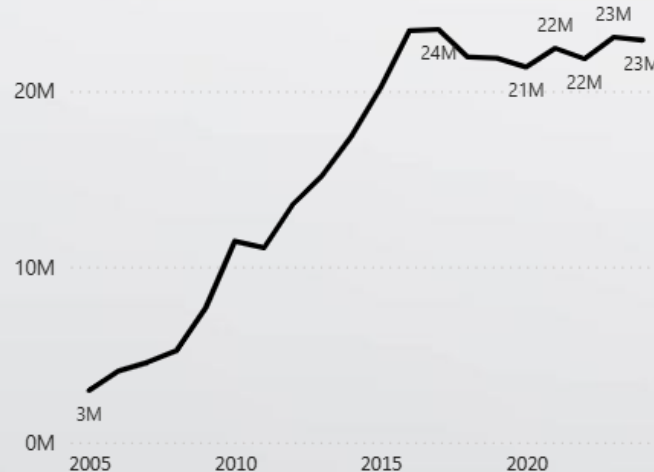
VIO OF TOP 1 VEHICLE

1,811,613

POPULATION SHARE

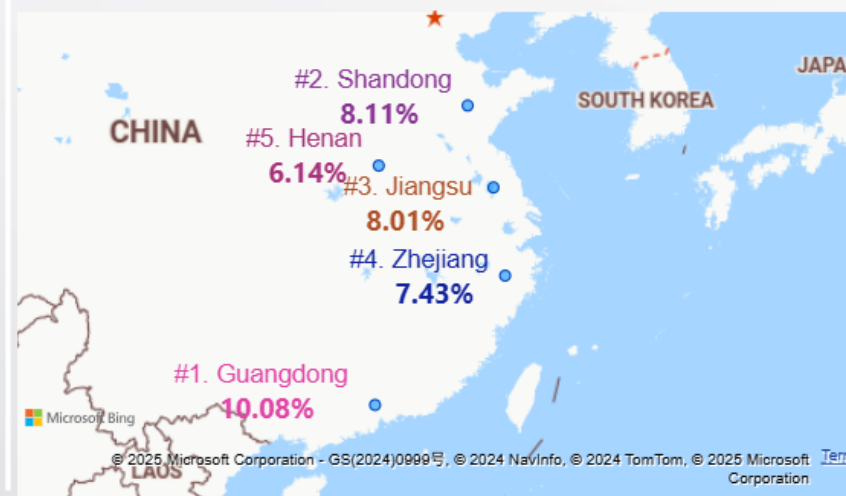
0.57%

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 CN Vehicle Brands Researched

3671

Generic Articles of CN Vehicle Brands Researched

235

OE Numbers of CN Vehicle Brands Researched

129K

CN Vehicle Brands Covered

101

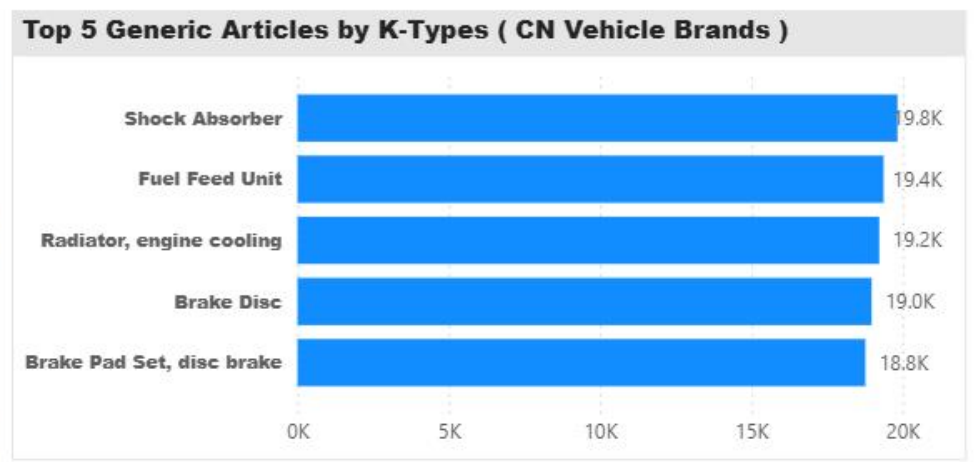
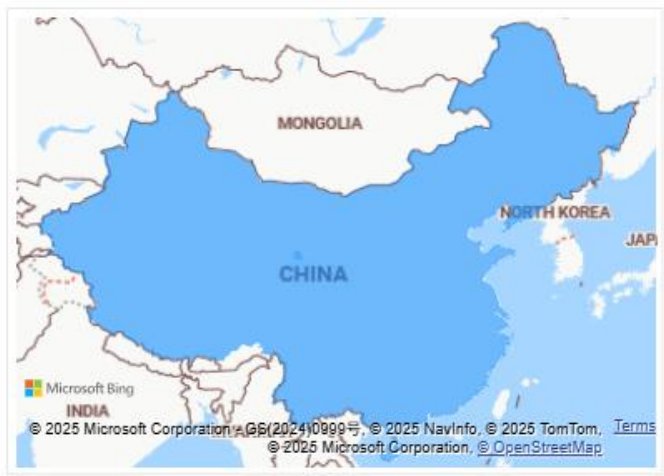
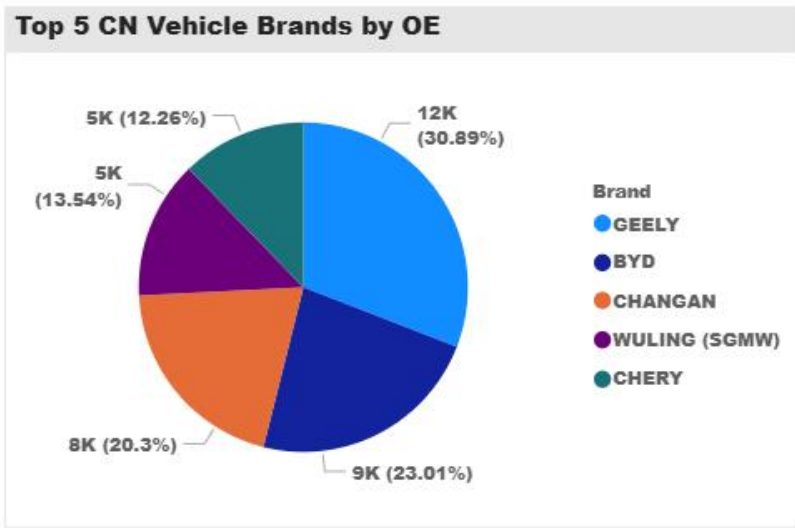
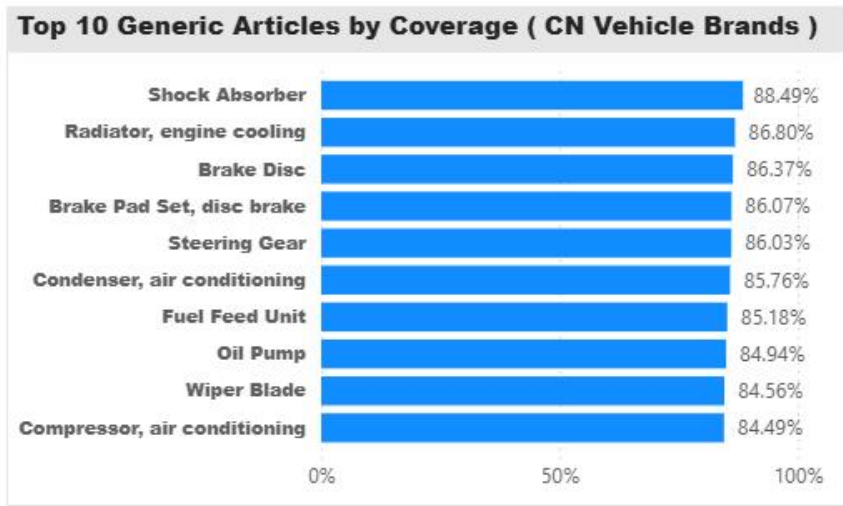


CHINA ▾ 2025 ▾ Jul ▾



Total OE numbers of GEELY

12K



03

Company News

- Highlights of TecAlliance China Customer Training Workshop in Guangzhou
- 2025 China Marketing Communication Roadmap



Highlights of TecAlliance China Customer Training Workshop in Guangzhou



On June 27th, TecAlliance China successfully held a customer training workshop in Guangzhou. The event comprehensively showcased TecAlliance's technical capabilities and innovative achievements in the automotive aftermarket data services through a systematic content framework and hands-on case demonstrations, attracting active participation from clients across South China.

- **Building a Full Lifecycle Data Ecosystem**

The training focused on "TecAlliance's Data Ecosystem and Vision," detailing a complete data solution covering the entire lifecycle from pre-product research to post-launch management. By presenting TecAlliance's data standardization system, multi-dimensional data architecture, and typical application scenarios, the event systematically demonstrated how data-driven approaches can upgrade business models. This ecosystem aims to support global business expansion, assist partners in achieving digital transformation and maintaining a competitive edge in a fiercely contested market.

- **Hands-on Demonstration of Standard Data Application Methodology**

Building on theoretical frameworks, the training featured a practical demonstration of "Standard Data Application Guidance." Instructors used real-world cases such as the "High-Potential Product Screening Model" and "North American Vehicle Lifecycle Analysis" to vividly illustrate the implementation path of standardized data applications. Through immersive learning, participants quickly grasped core techniques for translating data value into business outcomes and expanded their perspectives on diversified applications.

- **Three Core Modules to Deepen Product Understanding**

In-Depth Analysis of North American Data Standards, Comprehensive Demo of ONE Platform Features and the Soon-to-be-Launched Return System.

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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