

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version May 2025

01 Market Outlook

- China Mainland
- China Hong Kong
- China Taiwan

02 TecAlliance Data

- OES Data Overview

03 Company News

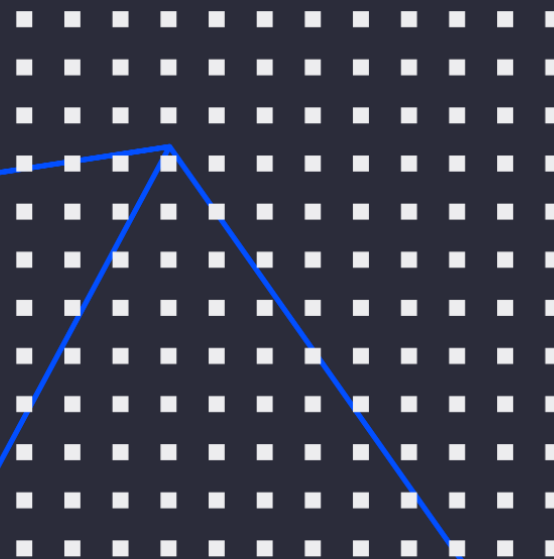
- 2025 China Marketing Communication Roadmap



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



China Mainland Highlight Vehicle News

In 2025, the sales of new energy vehicles are expected to reach 16.5 million.

How can car manufacturers win in the 'second half'?



- The China Electric Vehicle 100 Forum and L.E.K. Consulting jointly released the first in-depth report focusing on the new energy consumption trends of the younger generation. This report is based on L.E.K.'s consumer mindset research model, capturing the preferences and core value propositions of the younger demographic, providing forward-looking strategic guidance for the industry, and promoting high-quality development and healthy market growth in the automotive sector.
- The strategic report points out that the global core automotive market has entered a saturation phase, and China's automotive market has also entered an era of stock competition. However, the new energy vehicle market is still in a phase of rapid development. By 2025, the sales volume of new energy vehicles (including exports) is expected to reach 16.5 million units, maintaining a growth rate of 30%, with the domestic market penetration rate exceeding 55%. By 2030, China's new energy penetration rate will exceed 70%.
- Shijianhua, the deputy secretary-general of the China Electric Vehicle 100 Forum, pointed out that the new energy consumption market is undergoing structural transformation, with the demand for upgrades and replacements becoming the core driving force. The market is rapidly descending into third-tier cities and below, with a sales growth rate in the sinking market reaching as high as 61%. Prices are focused in the popular range of 100,000 to 150,000 yuan, as the industry moves towards a new stage of 'technological inclusiveness'.

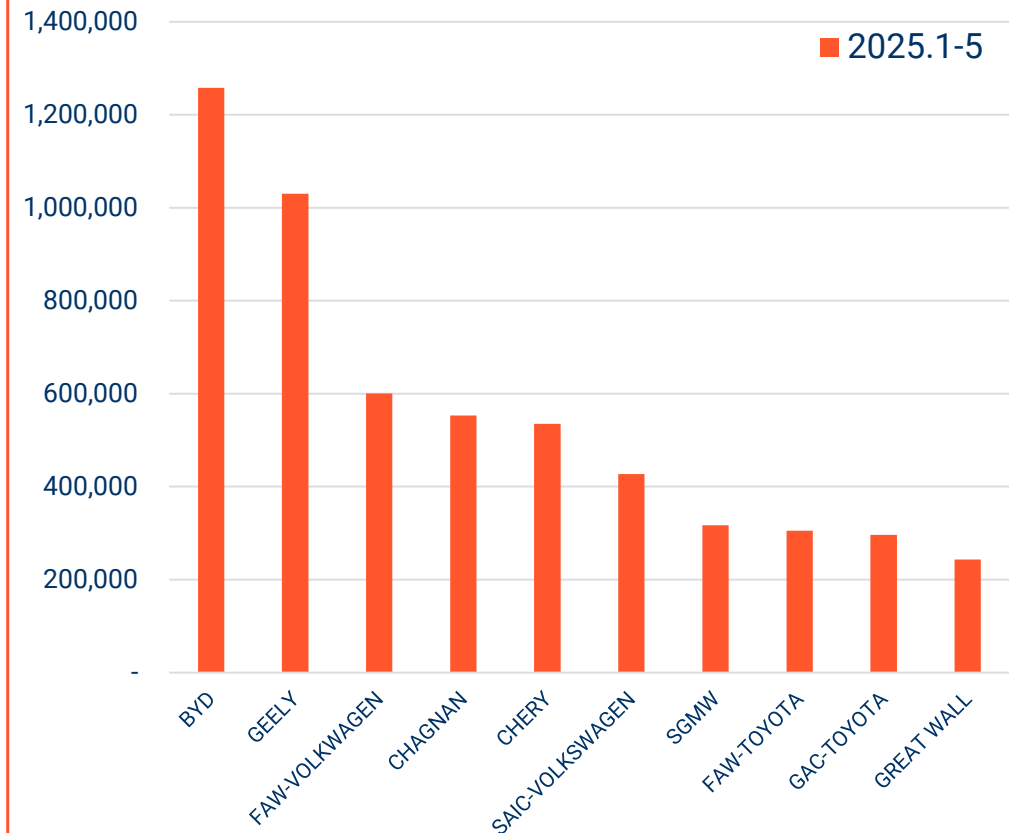
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in May 2025



Sales comparison

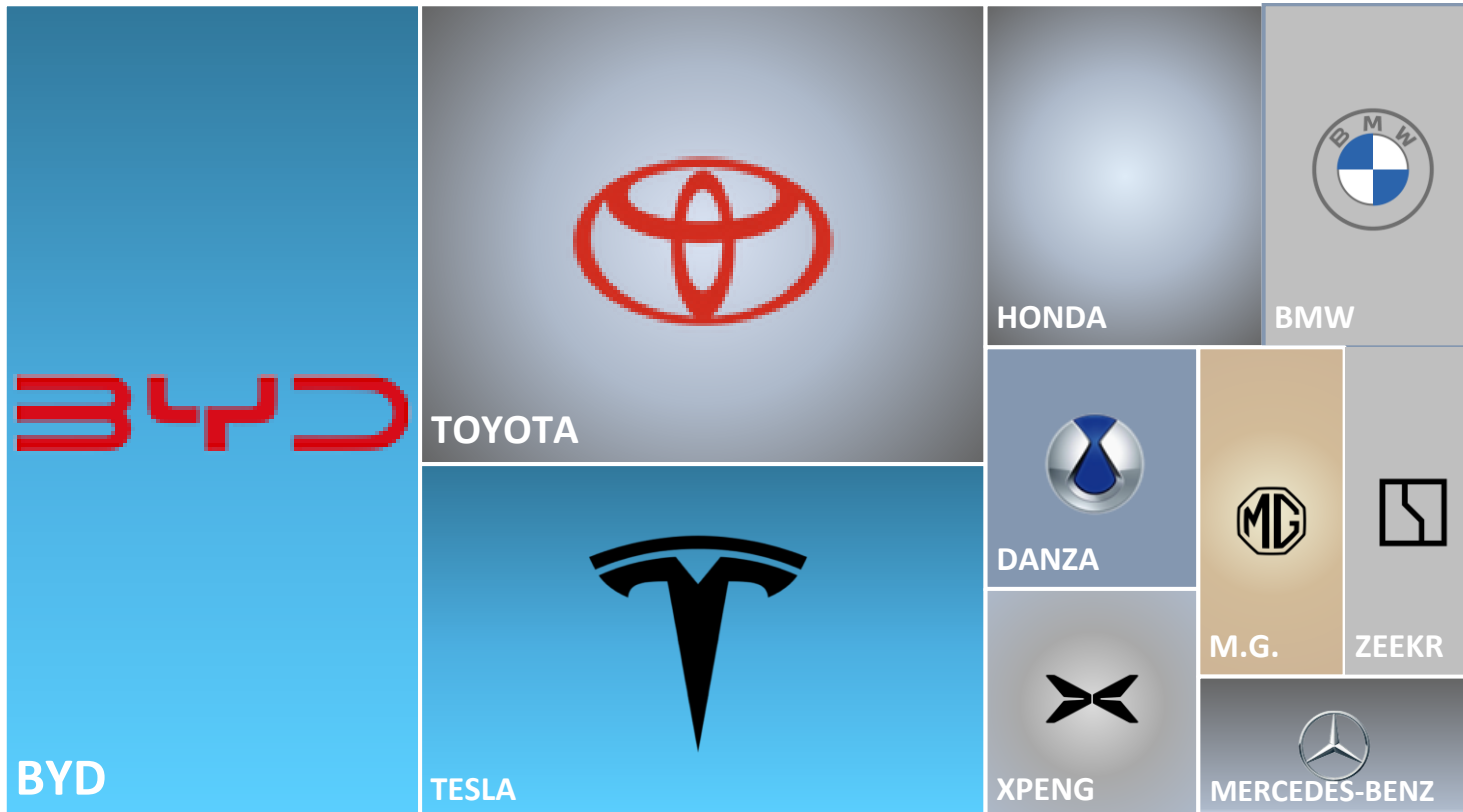
From January to May, BYD's sales are ahead of other brands.



Hong Kong Highlight Vehicle News

Hong Kong March 2025 Vehicle News

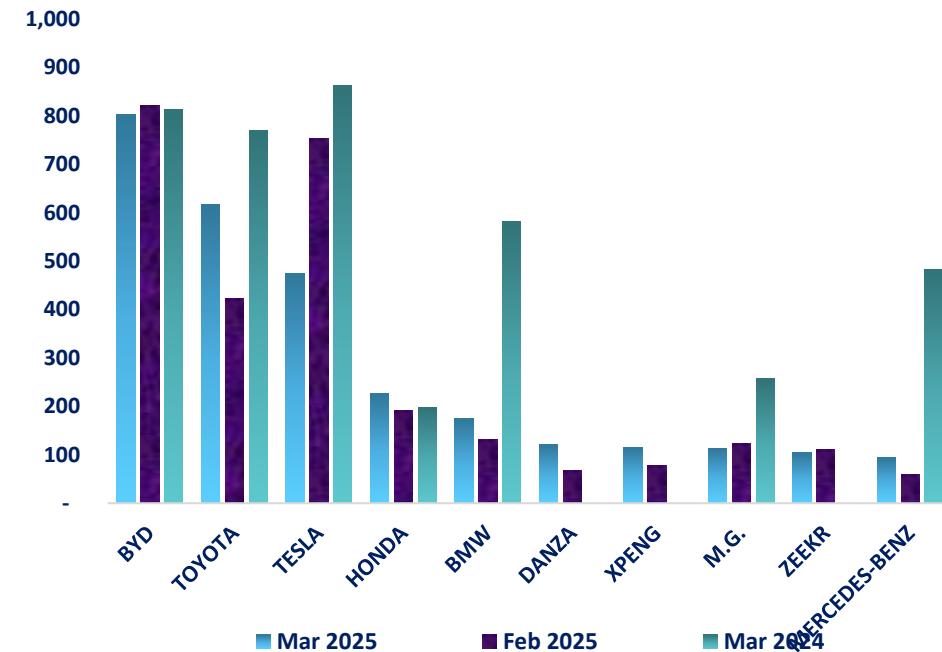
Passenger car sales in Hong Kong were 3,622 rounds in March 2025 and 3,335 cars in February 2025, representing a month-on-month increase of 8.6%. With sales of 802 units, BYD continues to be the most popular car brand in Hong Kong. Toyota ranked second with 616 cargo, up 46% month-on-month; TESLA fell 37% month-on-month to rank third; Honda's sales increased by 17.7% month-on-month, ranking fourth; The BMW came in fifth place with 174 units sold. 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 March, BYD continued to win the Hong Kong auto sales crown, with Toyota ranking second with 616 units and TESLA ranking third with 475 units. Honda was in 4th place with 226 units, BMW was in 5th place with 174 units, and DENZA was in 6th place with 122 units. In seventh place was XPENG, with 116 units sold. M.G., ZEEKR and Mercedes-Benz sold 114, 104 and 94 units, respectively, ranking 8th, 9th and 10th.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for May 2025

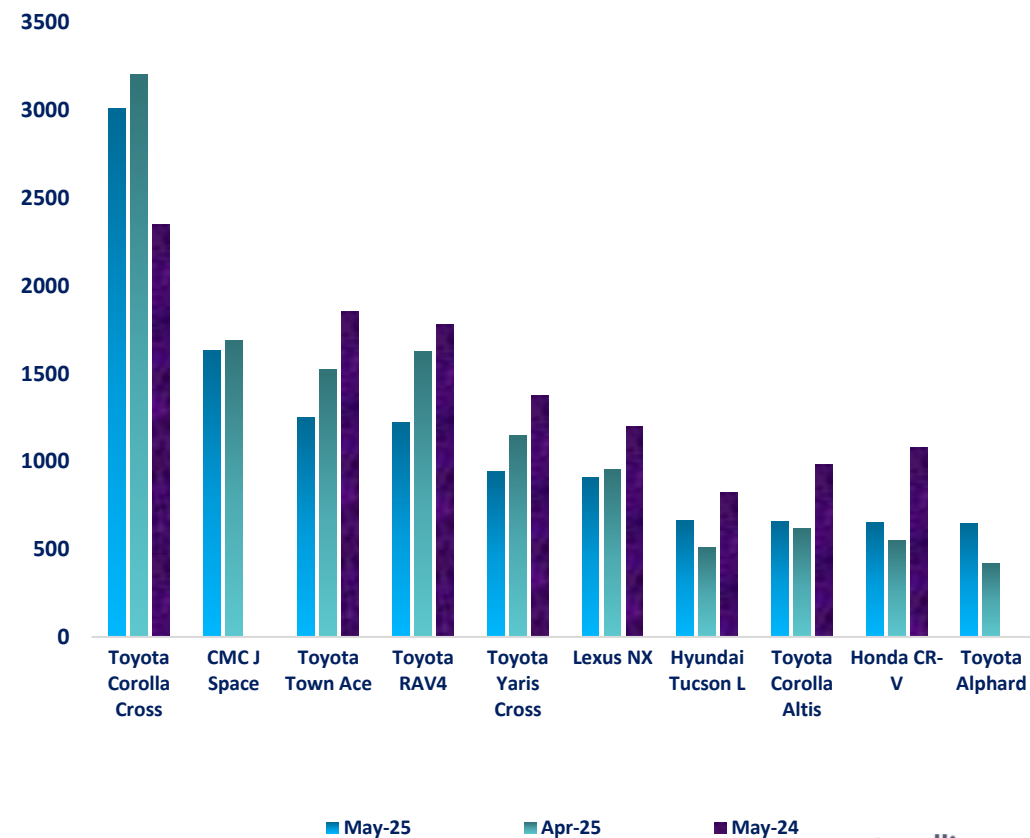


Taiwan's new car market has felt the impact of the US reciprocal tariff policy, and the anticipation of tariff and goods tax reductions from all walks of life has intensified the outlook of the new car consumer market. After the May 2025 sales statistics, the number of cards claimed in the month was only 31,910, not only without the traditional mid-year race month fever, but also a significant decline of 23.1% compared to the same period in 2024. At the same time, the cumulative sales volume from January to May 2025 will only reach 164,647 units, compared with the cumulative sales volume in the first five months of 2024, and the gap will further widen to 13.8% from 11.2% in April. The overall new car sales data do reflect the market's buying climate and waiting.

Sale Comparison

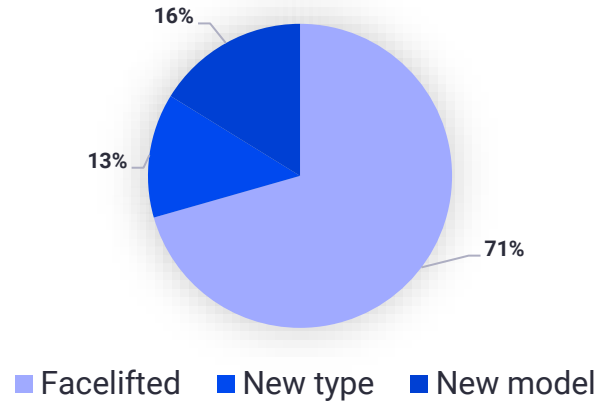
Total market sales tend to decline

Toyota Corolla Cross and CMC J Space were the first and second runners-up in the market, with 3,012 and 1,632 units respectively taking the lead. Toyota's Town Ace sales fell 17.9% from April to third place with 1,249 units. Toyota's RAV4 sales fell 24.7% from April to fourth place with 1,224 units. Toyota's Yaris Cross came in fifth place with 941 units sold, while the Lexus NX was sixth with 909 units sold. Finally, the Hyundai Tucson L, Toyota Corolla Altis, Honda CR-V, and Toyota Alphard ranked seventh, eighth, ninth, and tenth with 662, 657, 652, and 647 units, respectively.

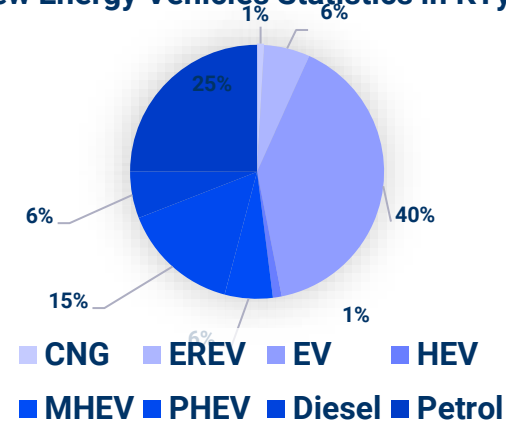


China JAN-MAY New Vehicle Analysis

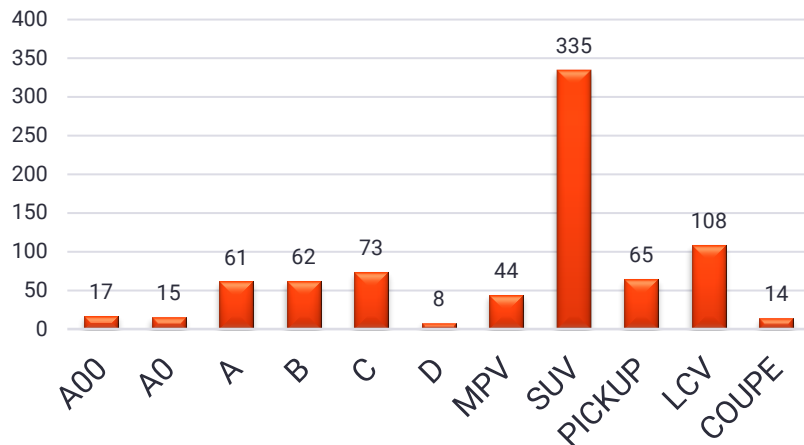
New vehicle statistics in KType



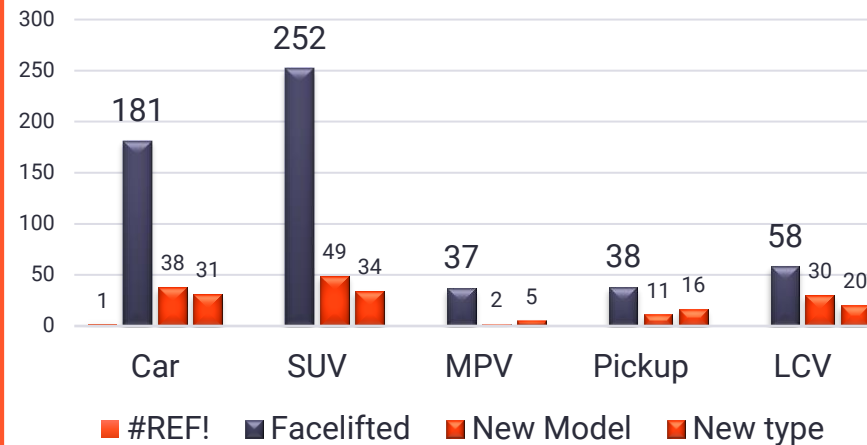
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to May 2025**, the total coverage of **K-Type** was **802**, of which **236** 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	59
2	CHANGAN	32
3	JETOUR	29
4	MAXUS	29
5	CHANA	29
6	MERCEDES-BENZ	23
7	VW (FAW)	22
8	HONGQI	20
9	CHERY	18
10	EXEED (CHERY)	16
11	AEOLUS	14
12	DEEPAL	14
13	AVATR	14
14	DONGFENG (DFAC)	13
15	MERCEDES-BENZ (BBDC)	13
16	AUDI (FAW)	12
17	JAC	12
18	SRM (BRILLIANCE)	12
19	VW (SVW)	12
20	ert	11
21	NAC IVECO (NAVECO)	11
22	SKYWORTH	10
23	COWIN	10
24	ISUZU (JIANGXI)	9
25	JMC	9
26	FOTON	9
27	ARCFOX	9
28	LEAPMOTOR	8
29	GEELY	8
30	WULING (SGMW)	8

#	Brand	Total
31	XPENG	8
32	FENGXING	7
33	GALAXY	7
34	BESTUNE	7
35	BMW (BRILLIANCE)	7
36	IM MOTORS	7
37	HONDA (GAC)	7
38	FARIZON AUTO	7
39	TANK	6
40	FORD (JMC)	6
41	BAW	6
42	ROEWE (SAIC)	6
43	GAC	6
44	NISSAN (DFAC)	6
45	RADAR	6
46	HAVAL	5
47	AITO	5
48	LYNK & CO	5
49	LIXIANG	5
50	TOYOTA (GAC)	4
51	i CAR	4
52	QIYUAN	4
53	JMEV	4
54	AUDI	4
55	LOTUS	4
56	GAC NE	4
57	SINOTRUK (CNHTC)	4
58	NEW BAOJUN	4
59	KARRY	4
60	LANDIAN	4

#	Brand	Total
61	BUICK (SGM)	4
62	JAC EV	4
63	PORSCHE	4
64	KIA (DYK)	4
65	NIO	4
66	TESLA	3
67	PEUGEOT (DF-PSA)	3
68	LINXYS	3
69	LAND ROVER	3
70	HONDA (DONGFENG)	3
71	CADILLAC (SGM)	3
72	NISSAN (ZHENGZHOU)	3
73	JEEP	3
74	GREAT WALL	3
75	VOLVO	3
76	ZEEKR	3
77	TOYOTA	2
78	JINBEI	2
79	JETTA	2
80	NAMMI	2
81	VICTORY	2
82	DENZA	2
83	VOYAH	2
84	NEOMOR	2
85	REFINE	2
86	TESLA	2
87	FANGCHENGBAO	2
88	LEVC	2
89	YUFENG	2
90	MG (SAIC)	2

#	Brand	Total
91	YANGWANG	2
92	BMW	2
93	CAVAN	2
94	BAIC-ORV	2
95	HYPER	2
96	MINI	2
97	LUXEED	2
98	ZD	2
99	VW(ANHUI)	2
100	M-HERO	2
101	SMART	2
102	FENGON	2
103	WEY	2
104	GENESIS	2
105	POLESTAR	2
106	JUNEYAO	2
107	VOLVO ASIA	2
108	BAIC	1
109	LIVAN AUTO	1
110	MERCEDES-BENZ (FJDA)	1
111	RCEV	1
112	LETIN	1
113	VGX	1
114	MAPLE	1
115	MINI	1
116	TOYOTA (FAW)	1
117	BENTLEY	1
118	SMART	1
119	XIAOMI	1
120	VENUCIA	1

#	Brand	Total
121	MASERATI	1
122	OSHAN	1
123	LAMBORGHINI	1
124	VW	1
125	STELATO	1
126	ATIO	1
127	ROLLS-ROYCE	1
128	LINCOLN (CHANGAN)	1
129	FIREFLY	1
130	SUZUKI	1
131	JAGUAR (CHERY)	1
132	AUDI (SAIC)	1
133	LINGBOX	1
134	SWM MOTORS	1
135	KTM	1
136	HEDMOS	1

Remarks:
All statistical data is based on K-Type. From **January to May 2025**, the total coverage of **K-Type** was **802**, of which **236** 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

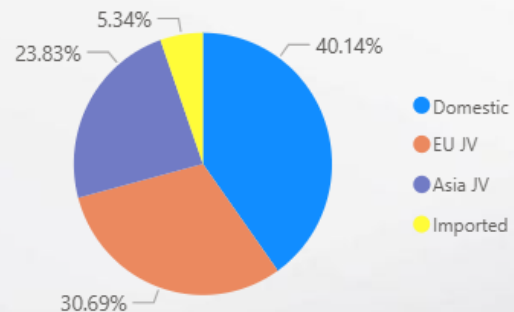
EU JOINT VENTURE CAR

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

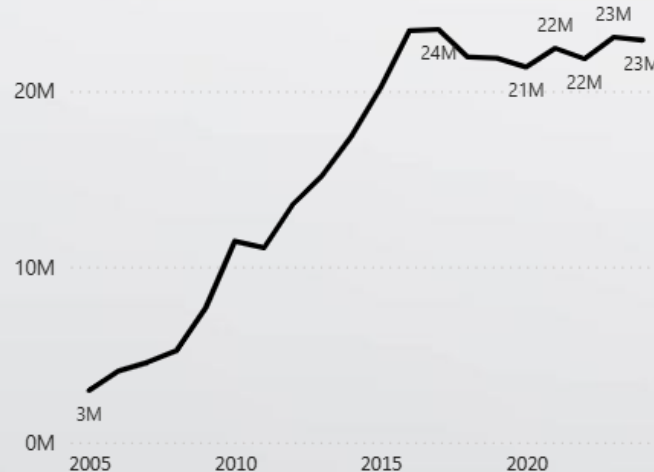
VIO OF TOP 1 VEHICLE

1,811,613

POPULATION SHARE

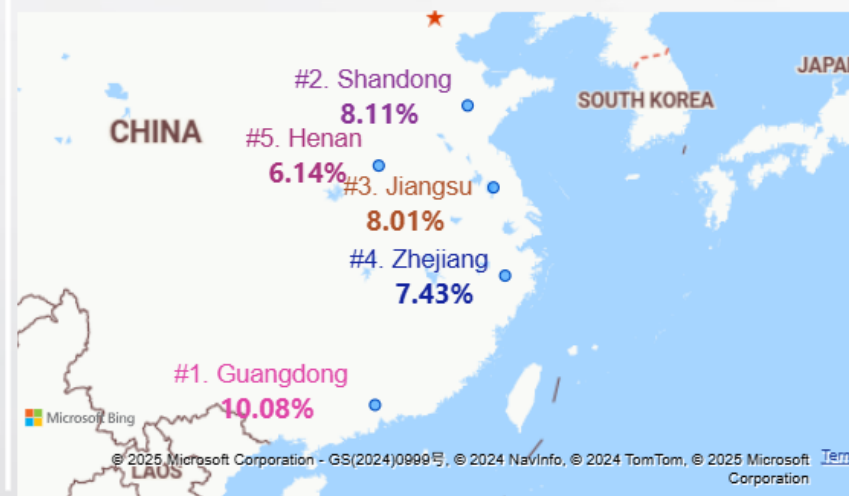
0.57%

TREND OF REGISTRATION FROM 2005 TO 2024(Overall PC)



TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2024)

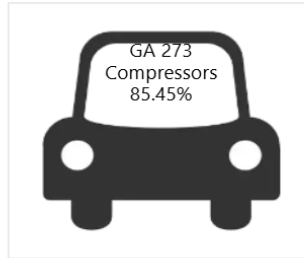
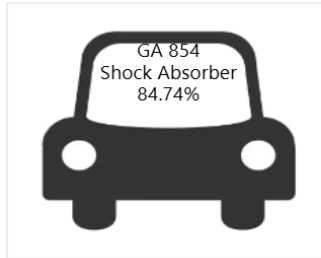


02

TecAlliance Data OES Data Overview



OE Coverage by VIO



NUMBER of Specific
GA for NEV

10

NUMBER of GA for
NEV & ICE

63

NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
447	Compressors	85.45%
854	Shock Absorber	84.74%
286	Steering Gear	83.92%
273	Track Control Arm	83.59%
298	Wiper Blade	81.94%
424	Interior air Filter	80.95%
402	Pad (disc brake)	80.30%
82	Disc	80.15%
654	Wheel Bearing Kit	78.97%
448	Condenser	78.14%
1	Starter Battery	77.99%
78	Caliper cylinder (housing)	77.62%
83	Brake hose	77.57%
793	Electric Motor Blower	76.77%
508	Radiator Fan Complete	75.72%
412	Sensor, wheel speed	74.26%
13	Drive Shaft	72.96%
3229	Link,(Rod/Strut) stabilizer	72.03%
471	Evaporators	68.50%

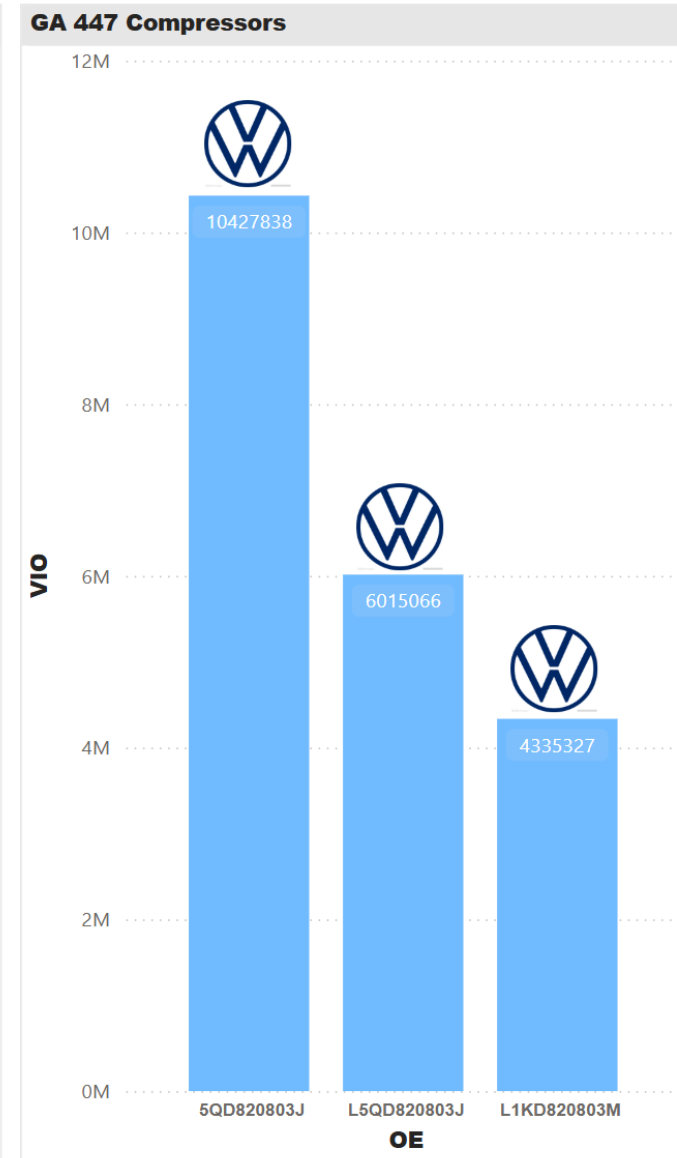
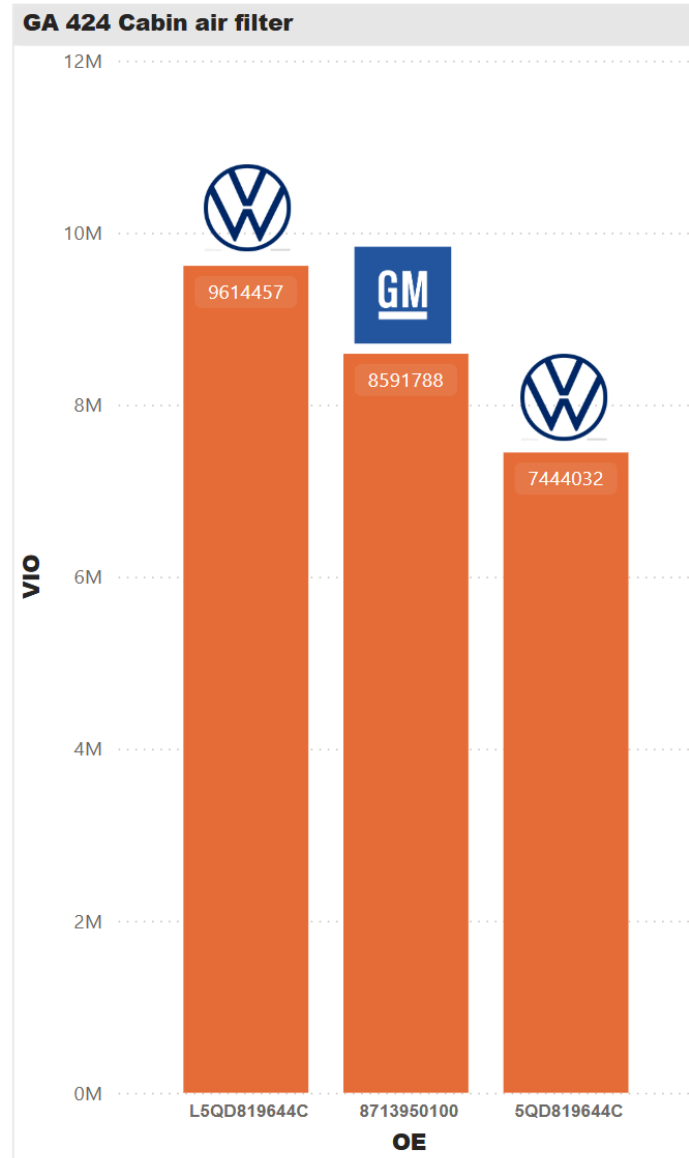
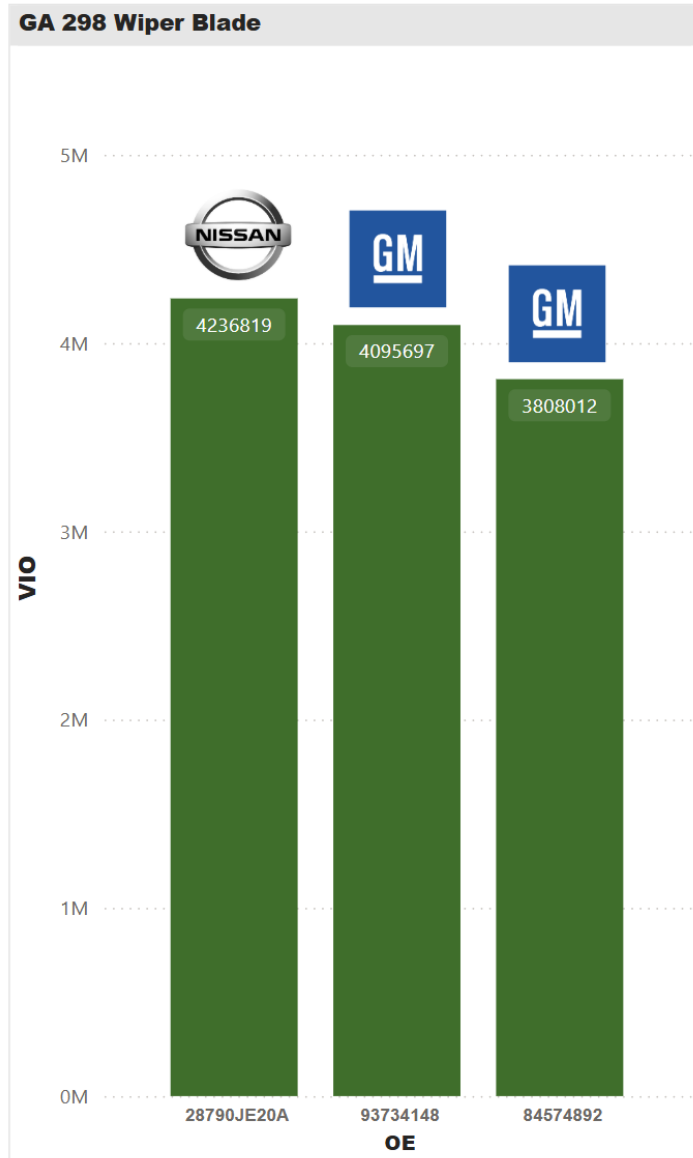
NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
1561	Regulator,window	67.82%
1351	Additional Water Pump	65.99%
5031	Radiator, Drive Battery	65.61%
467	Heat Exchanger, interior heating	64.57%
219	Gas spring boot-/cargo area	64.48%
397	Expansion Tank, coolant	62.56%
1211	Steering Column	61.17%
1180	Suspension Strut Support Mounting	60.10%
1182	Rubber Buffer, suspension	54.87%
3365	Cover/Rubber Boot, shock absorber	54.15%
183	Expansion Valve, air conditioning	53.48%
914	Tie Rod End	53.18%
247	Mounting, engine	52.23%
1626	Friction Bearing	50.23%
2232	Wheel Sensor,tyre pressure control system	49.09%
258	Brake Master Cylinder	42.97%
200	Electro Motor, window regulator	39.66%
8558	Battery Pack/48 V Battery	36.99%
2462	Ball Joint,(Support-/Controlarm Link)	32.54%

NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
2462	Ball Joint,(Support-/Controlarm Link)	32.54%
60573	Electromotor	30.37%
5761	Charge Cable, electric vehicle	29.19%
51	Axial Joint (steering)	28.28%
5314	Screw Set, brake disc	27.73%
60506	Inverter Converter	27.34%
331	Bushing, stabilizer	25.87%
514	Gas spring engine flap	25.42%
60172	Charger, Traction battery	23.70%
191	Bellows (steering)	22.82%
123	Drum	20.22%
851	Receiver Driers	19.99%
70	Shoe (drum brake)	19.38%
60173	Control Unit, battery management	18.18%
251	Control Arm-/Trailing Arm Bush	17.63%
301	Wiper Arm,windscreen washer	16.52%
124	Primary handbrake cable	16.18%
655	Wheel Bearing	15.98%

Top 3 Coverage of OE by VIO



PADS NEV Dashboard

**K-TYPEs Researched
YTD 2025**

740

**OE NOs Researched
YTD 2025**

23,449

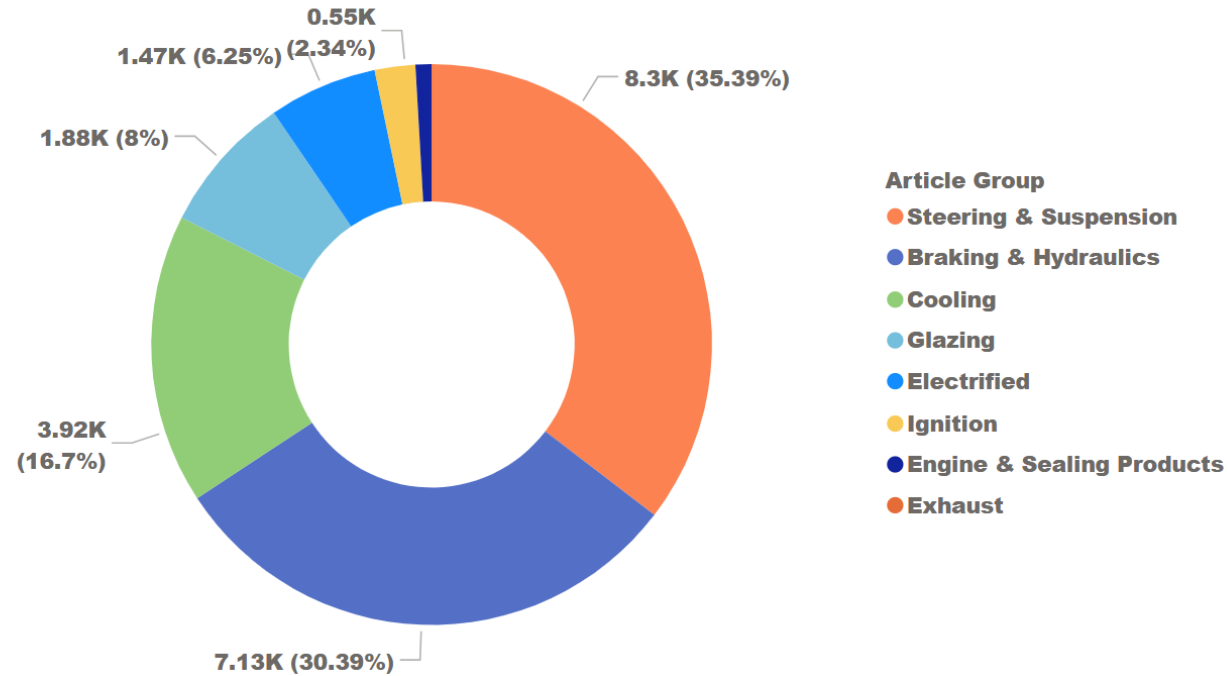
**GA Researched YTD
2025**

113

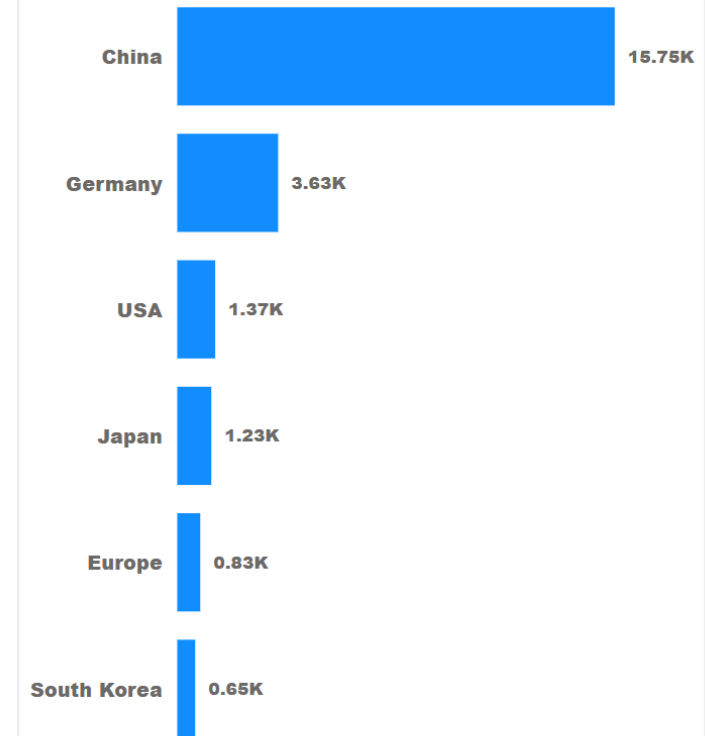
**Vehicle Brands Covered
YTD 2025**

113

Total Group by Number of OE



Total Brand Series by Number of OE



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...

Contact Us

Commercial Director China



Werner Chen
Hongji.chen@tecalliance.net
Tel: +86 13564549252

Sales Lead China



Vivi Liu
Haiying.Liu@tecalliance.net
Tel: +86 182 2149 5081

Sales Manager China



Joe Jia
Chunhui.Jia@tecalliance.net
Tel: +86 173 7264 2905



Ryan Zheng
Yunze.zheng@tecalliance.net
Tel: +86 138 457 79815



Ethan Xue
Jingyu.xue@tecalliance.net
Tel: +86 151 514 14273



Franky Zhou
Qi.Zhou@tecalliance.net
Tel: +86 135 2479 6845



Tonny Liu
Jia.liu@tecalliance.net
Tel: +86 135 640 08126

Account Management Taiwan (China)



Calinda Zhang
Junfang.Zhang@tecalliance.net
Tel: +886 903576846

Regional Marketing Manager China



Jackie Pang
Jie.pang@tecalliance.net
Tel: +86 173 1717 5912

THANK YOU!



TecAlliance China Ltd.

+86 21 3387 0258

sales_cn@tecalliance.net

www.tecalliance.cn



Room 901, Block G, Xuhui Vanke, No. 9335 Humin Road, Xuhui District, Shanghai, China 200235

www.tecalliance.cn