

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version November 2025

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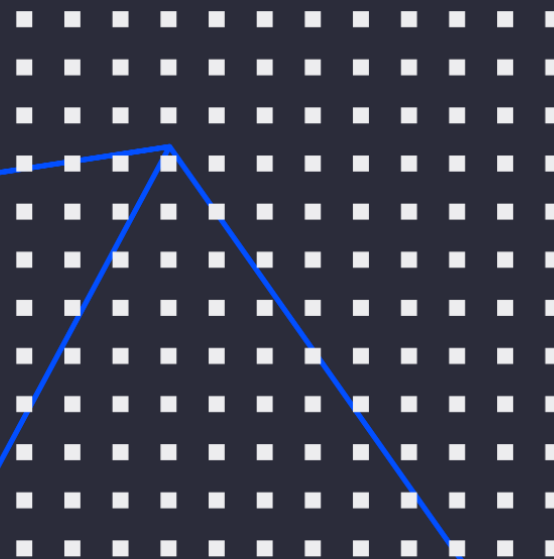
- 2025 Automechanika Shanghai - a Successful Wrap-Up



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



China Mainland Highlight Vehicle News

Big Year for Products: Huawei HarmonyOS Smart Mobility 2026 New Car Plans Exposed, Comprehensive Layout for Sedans/SUVs/MPVs

On December 9, HarmonyOS Smart Mobility will host the 'Five Realms' special live broadcast of 'Together'. Richard Yu, Executive Director of Huawei, Head of the Product Investment Committee, and President of the Terminal BG, along with leaders from the 'Five Realms' automakers, previewed their product plans and technology directions for 2026.

On the technical level, in 2026, Huawei Qian Kun Smart Driving will enter the era of L3 and L3+, with Yu Chengdong revealing that drivers might even be able to sleep in the car. By 2027, Huawei Qian Kun Smart Driving is expected to reach the L4 stage, but whether it can be activated will still depend on national regulations and standards. In addition, the HarmonyOS cockpit will also offer new experiences in 2026.

At the product level, Shangjie will launch at least two new cars in 2026, including a super sports coupe in the first quarter of 2026. The LUXEED V9 will be available in spring 2026, and LUXEED also has a sports-grade SUV that will be launched from fall to winter 2026. STELATO will introduce SUV and MPV models, which will be quite different; the STELATO SUV received very high praise from consumers after market research. The AITO product line will undergo a comprehensive iteration, with updated models for all current vehicles, and the AITO M6 will be introduced, with each release expected to be highly successful. MAEXTRO will also launch more high-end sedans, SUVs, and MPVs.



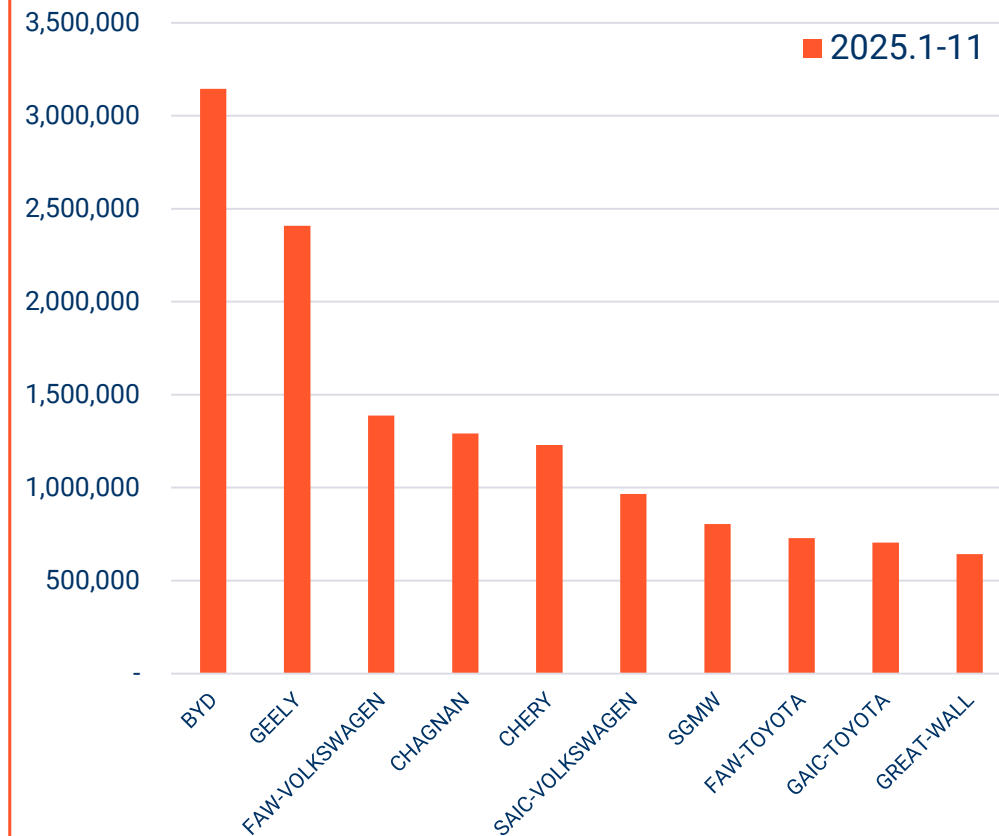
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in November 2025



Sales comparison

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

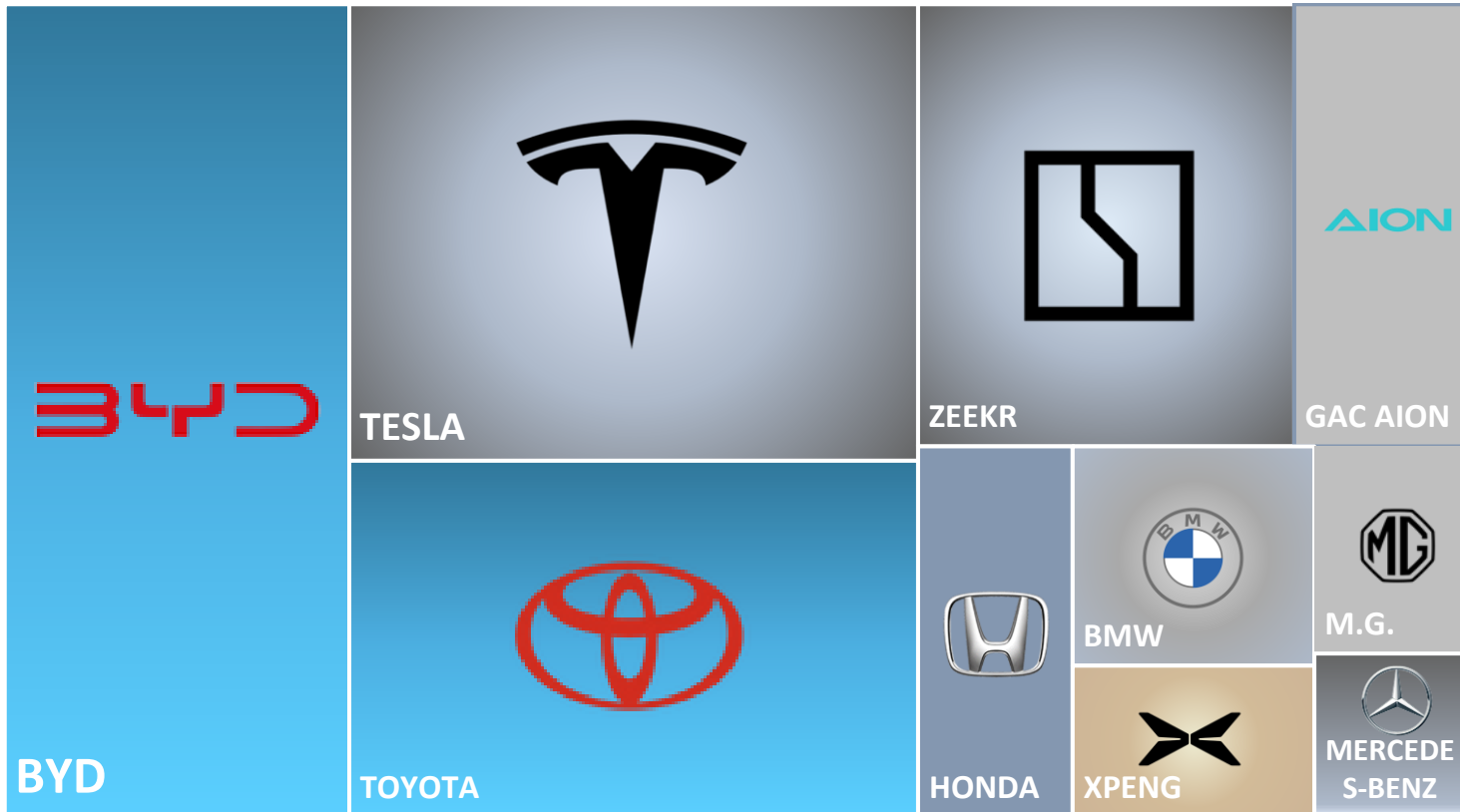


Hong Kong Highlight Vehicle News

Hong Kong September 2025 Vehicle News

Passenger car sales in Hong Kong reached 4,678 units in September 2025, up from 4,107 units in August 2025, representing a month-on-month growth of 13.9%. BYD sold 920 units, reclaiming its position as the most popular car brand in Hong Kong.

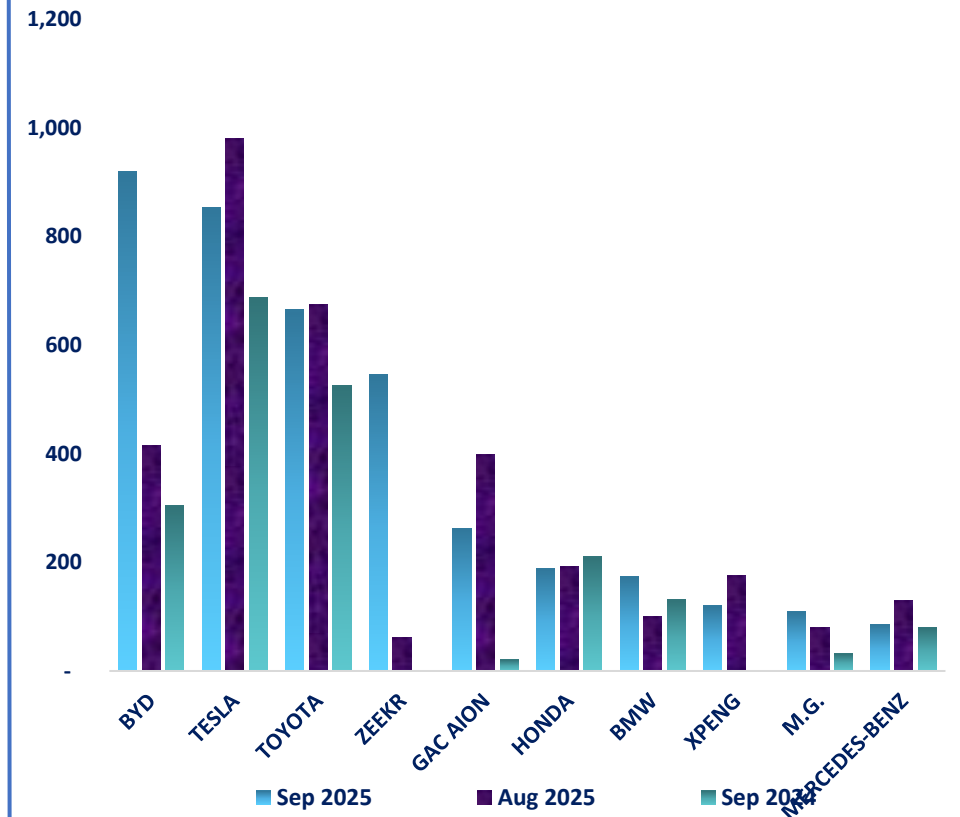
Tesla ranked second with 853 units sold, a month-on-month decrease of 13%. Toyota's sales fell 1.5% month-on-month, placing it in third position. ZEEKR's sales surged by 780.6% month-on-month, ranking fourth. GAC AION sold 262 units, ranking fifth. Overall, the market share of new energy vehicles continues to expand in Hong Kong, with the penetration rate of Mainland China's pure electric vehicles further increasing in the local market.



Sales Comparison

Hong Kong's automotive market is becoming electrified

In September, BYD claimed the top spot in car sales in Hong Kong, with Tesla ranking second with a monthly sales volume of 853 units, and Toyota ranking third with 665 units. ZEEKR ranked fourth with 546 units, GAC AION was fifth with 262 units, and Honda was sixth with 188 units. BMW came in seventh with 174 units sold. XPENG, MG, and Mercedes-Benz sold 120, 109, and 86 units, respectively, ranking eighth, ninth, and tenth.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for November 2025

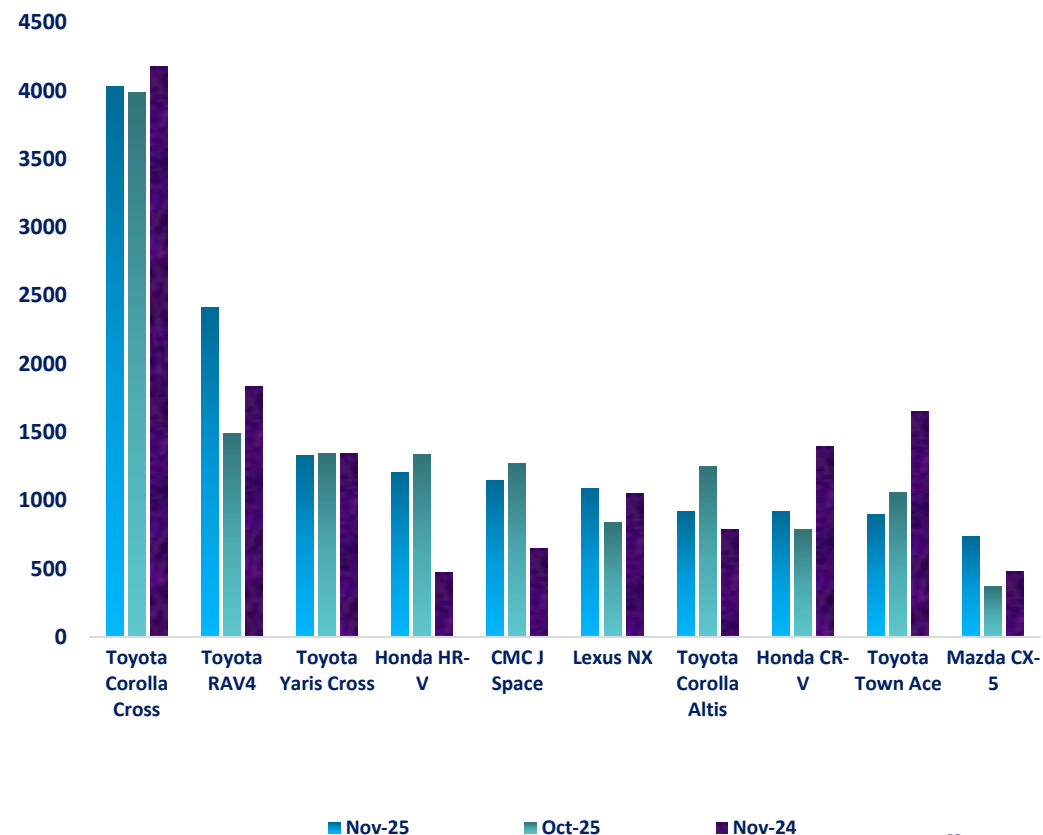


As the year comes to an end, car manufacturers are working hard to narrow the gap with their annual sales targets. In November, the total number of new car registrations reached 36,485 units. Although still some distance from the 40,000-unit mark, this represents a 5.7% increase compared to October. On another note, the cumulative sales from January to November 2025 reached 367,133 units. Compared to the same period in 2024, the November ratio is 88.1%, slightly up from 87.6% in October, narrowing the gap by 0.5%. Overall, the data suggests that the new car market continues to recover, which is likely positive news for all manufacturers.

■ Sale Comparison

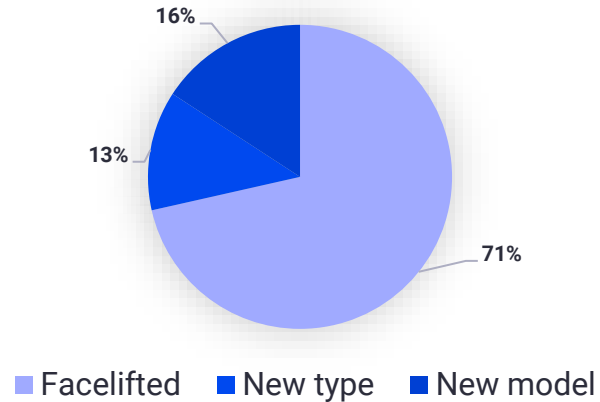
The new car market continues to recover

Toyota Corolla Cross and Toyota RAV4 took the top two spots in the market, achieving 4,034 and 2,415 registered units respectively. Toyota Yaris Cross saw a 1.2% drop in sales compared to October, with 1,329 units ranking third. Honda HR-V sales fell 9.9% from October, with 1,338 units placing fourth. CMC J Space ranked fifth with 1,149 units sold, while Lexus NX ranked sixth with 1,089 units. Finally, Toyota Corolla Altis, Honda CR-V, Toyota Town Ace, and Mazda CX-5 occupied the seventh to tenth positions, with sales of 922, 920, 894, and 739 units respectively.

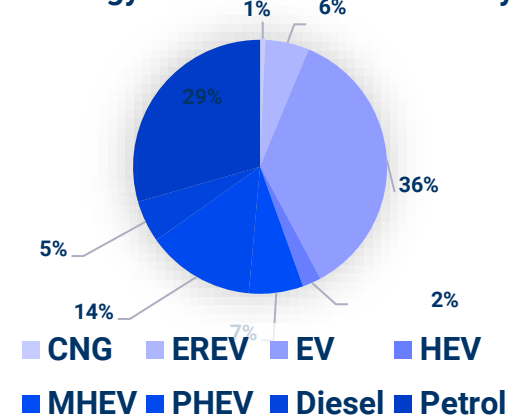


China JAN-NOV New Vehicle Analysis

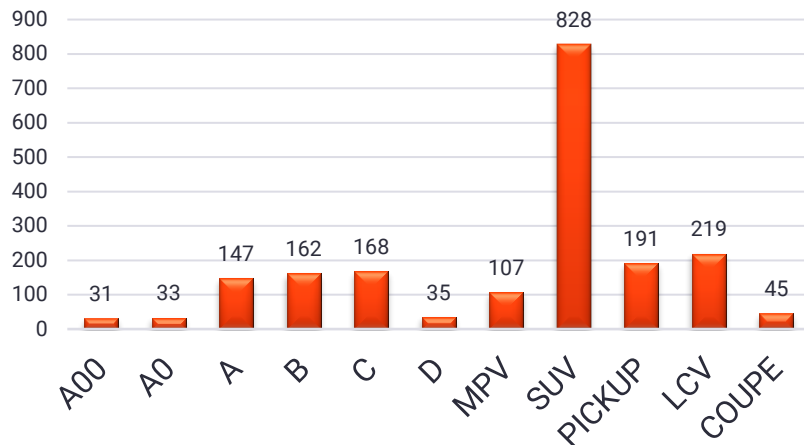
New vehicle statistics in KType



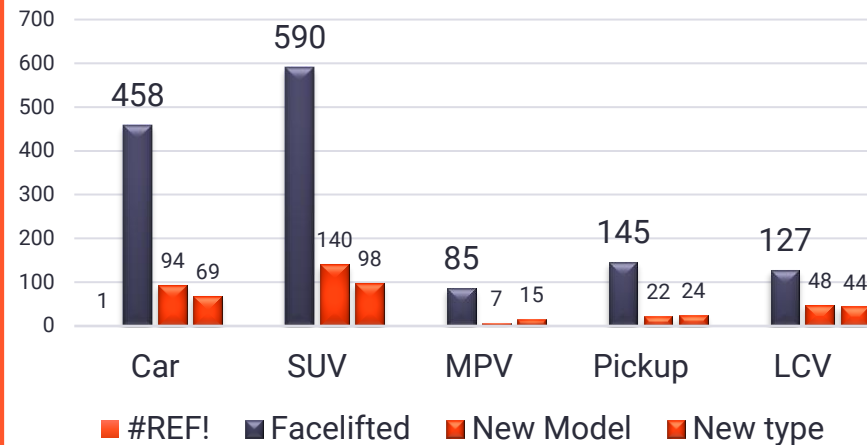
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to November 2025**, the total coverage of **K-Type** was **1966**, of which **561** 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

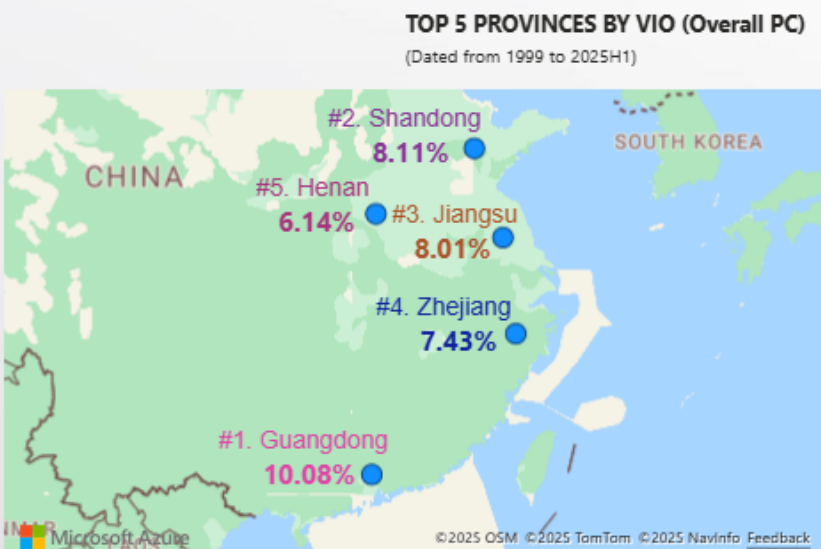
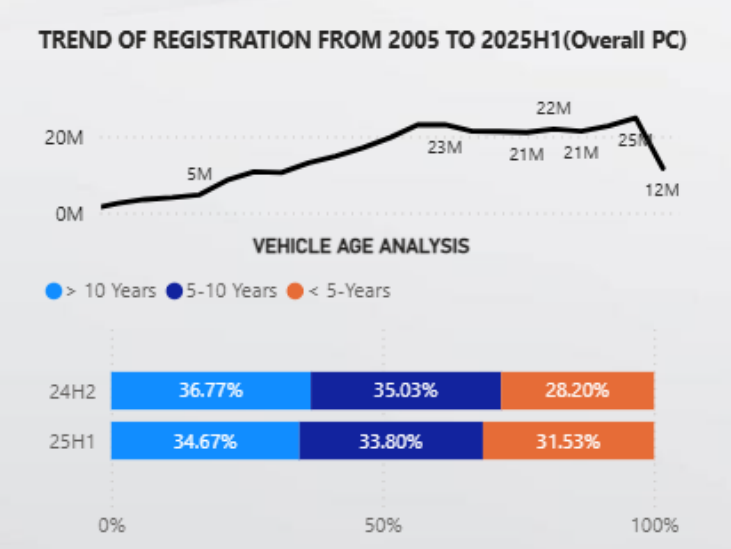
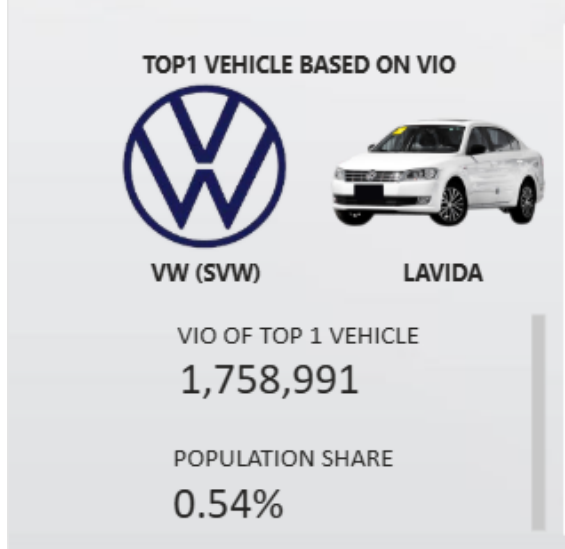
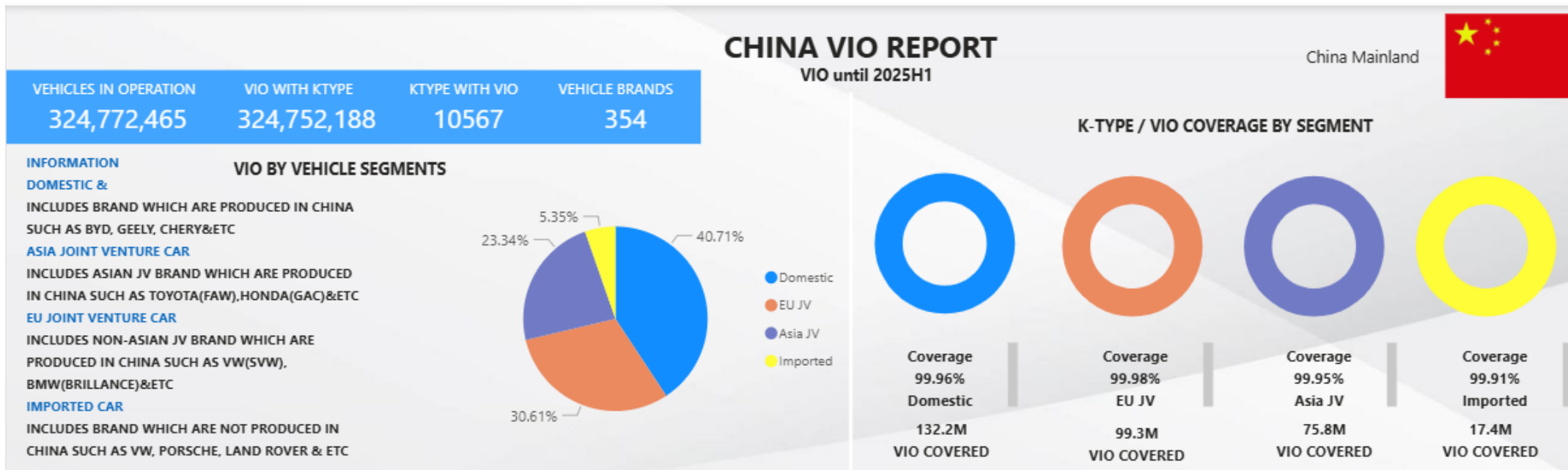
China New Vehicle Statistics

#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total	#	Brand	Total
1	BYD	86	31	LEAPMOTOR	19	61	AUDI (SAIC)	11	91	CADILLAC (SGM)	6	121	MAEXTRO	3	151	KTM	1
2	MERCEDES-BENZ	75	32	JMC	19	62	NIO	11	92	LANDIAN	6	122	CITROËN (DF-PSA)	3	152	HEDMOS	1
3	VW (FAW)	60	33	JINBEI	19	63	VOLVO ASIA	11	93	JEEP	6	123	ORA	3	153	INEOS	1
4	JETOUR	54	34	HAVAL	19	64	BAW	10	94	VOLVO	6	124	SAIC	3	154	HONGQI	1
5	CHANA	52	35	TOYOTA (GAC)	17	65	LAND ROVER	10	95	FORD (CHANGAN)	6	125	HYUNDAI (BEIJING)	3	155	LINGXI	1
6	CHERY	52	36	GAC NE	17	66	ZEEKR	10	96	ISUZU (QINGLING)	6	126	BAIC	2	156	AISHANG	1
7	DONGFENG (DFAC)	49	37	COWIN	16	67	MINI	9	97	RELY	6	127	LIVAN AUTO	2	157	JIETU ZONGHENG	1
8	CHANGAN	46	38	GALAXY	16	68	HONDA (DONGFENG)	9	98	RCEV	5	128	VICTORY	2	158	SUBARU	1
9	MAXUS	45	39	GREAT WALL	16	69	HONDA (GAC)	9	99	BENTLEY	5	129	NEOMOR	2	159	LAND ROVER(CHERY)	1
10	HONGQI	40	40	GAC	15	70	MG (SAIC)	9	100	AITO	5	130	LEVC	2	160	ASTON MARTIN	1
11	FOTON	36	41	IM MOTORS	15	71	HYPER	9	101	CAVAN	5	131	VW	2	161	DONGFENG FUKANG	1
12	PORSCHE	36	42	RADAR	15	72	LINCOLN (CHANGAN)	9	102	M-HERO	5	132	ZD	2			
13	FENGXING	34	43	BESTUNE	14	73	MAZDA (CHANGAN)	9	103	R AUTO	5	133	VW (ANHUI)	2			
14	VW (SVW)	33	44	ARCFOX	14	74	DONGFENG XIAOKANG	9	104	ONVO	5	134	FENGON	2			
15	EXEED (CHERY)	29	45	FARIZON AUTO	14	75	JMEV	8	105	PEUGEOT (DF-PSA)	4	135	SWM MOTORS	2			
16	AUDI (FAW)	28	46	TANK	13	76	LINXYS	8	106	XIAOMI	4	136	POLESTAR	2			
17	JAC	28	47	TESLA	13	77	LOTUS	8	107	JAC EV	4	137	JUNEYAO AUTO	2			
18	MERCEDES-BENZ (BBDC)	28	48	FORD (JMC)	13	78	FANGCHENGBAO	8	108	WEY	4	138	FERRARI	2			
19	DEEPAL	26	49	AUDI	13	79	KIA (DYK)	8	109	GENESIS	4	139	SUBARU	2			
20	QIYUAN	24	50	ROEWE (SAIC)	13	80	AITO	8	110	YE	4	140	ALFA ROMEO	2			
21	SKYWORTH	24	51	SRM (BRILLIANCE)	13	81	LUXEED	8	111	212	4	141	INFINITI (DFAC)	2			
22	BMW (BRILLIANCE)	24	52	NEW BAOJUN	13	82	LIXIANG	8	112	HYUNDAI	4	142	MERCEDES-BENZ (FJDA)	1			
23	AVATR	24	53	TOYOTA (FAW)	13	83	DENZA	7	113	TOYOTA	3	143	LETIN	1			
24	επ	23	54	LEXUS	13	84	KARRY	7	114	NAMMI	3	144	MAPLE	1			
25	GEELY	23	55	XPENG	12	85	SMART	7	115	REFINE	3	145	MASERATI	1			
26	WULING (SGMW)	23	56	BMW	12	86	NISSAN (ZHENGZHOU)	7	116	VENUCIA	3	146	OSHAN	1			
27	BUICK (SGM)	21	57	BAIC-ORV	12	87	STELATO	7	117	YUFENG	3	147	LAMBORGHINI	1			
28	AEOLUS	20	58	NAC IVECO (NAVECO)	11	88	i CAR	6	118	YANGWANG	3	148	ROLLS-ROYCE	1			
29	ISUZU (JIANGXI)	20	59	NISSAN (DFAC)	11	89	JETTA	6	119	FIREFLY	3	149	SUZUKI	1			
30	LYNK & CO	20	60	VOYAH	11	90	VGX	6	120	JAGUAR (CHERY)	3	150	LINGBOX	1			

Remarks:

All statistical data is based on K-Type. From **January to November 2025**, the total coverage of K-Type was **1966**, of which **561** were **New K-Type**.

China VIO Report



02

TecAlliance Data OES Data Overview



PV OE Data Research Dashboard

K-Types Researched | YTD 2025

9693

Generic Articles Researched | YTD 2025

242

OE Numbers Researched | YTD 2025

433549

Vehicle Brands Covered | YTD 2025

225



CHINA ▾ 2025 ▾ Nov ▾

NO.1 GA4119 Air Spring

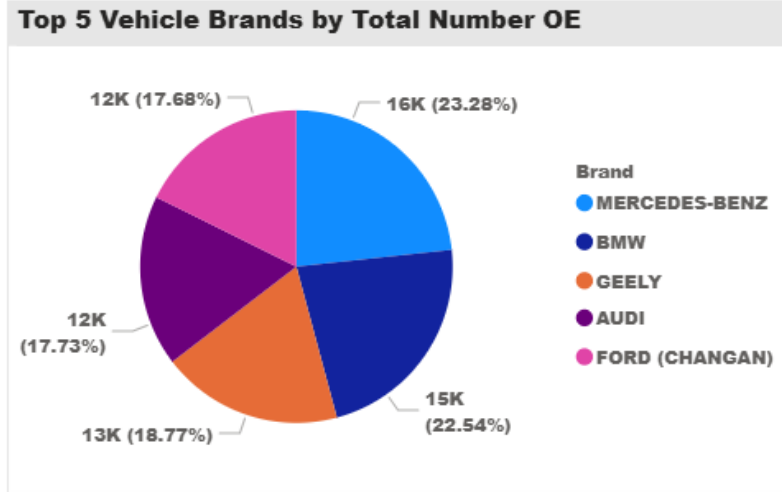
96.79%

NO.2 GA470 Radiator

96.79%

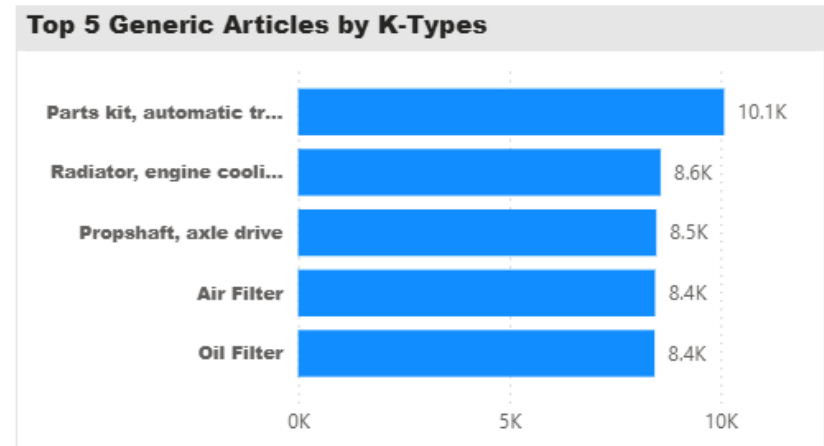
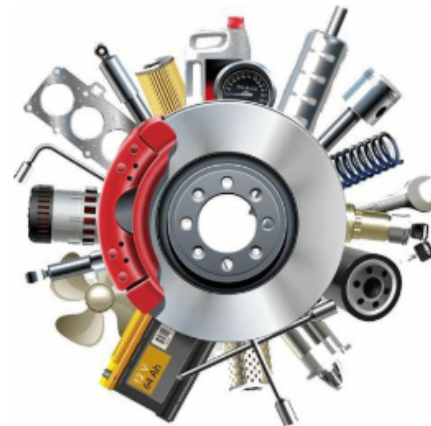
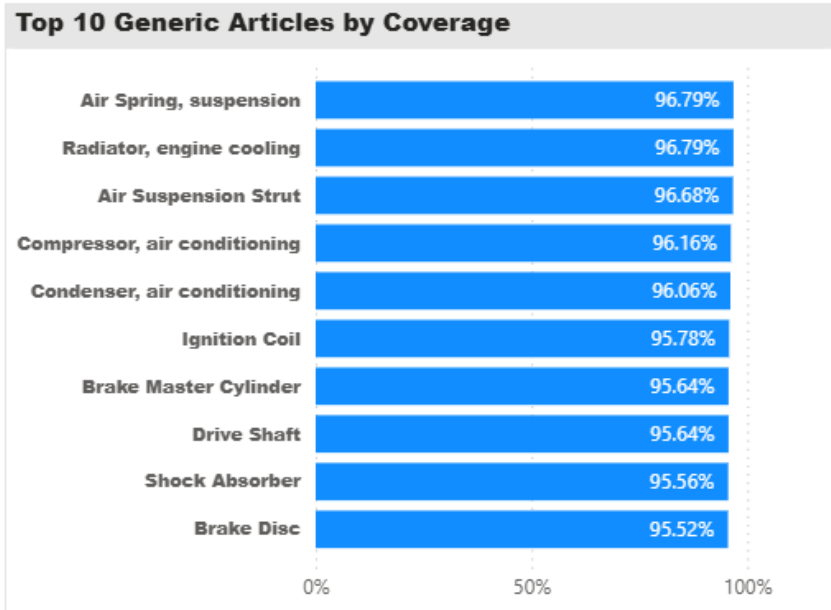
NO.3 GA4118 Air Suspension Strut

96.68%



Total numbers of OE for MERCEDES-BENZ

16K



New OE Part Number Databases for Chinese Brands in Brazil



Total Article Group

176

Total Linkage

3.6K

Total Brand

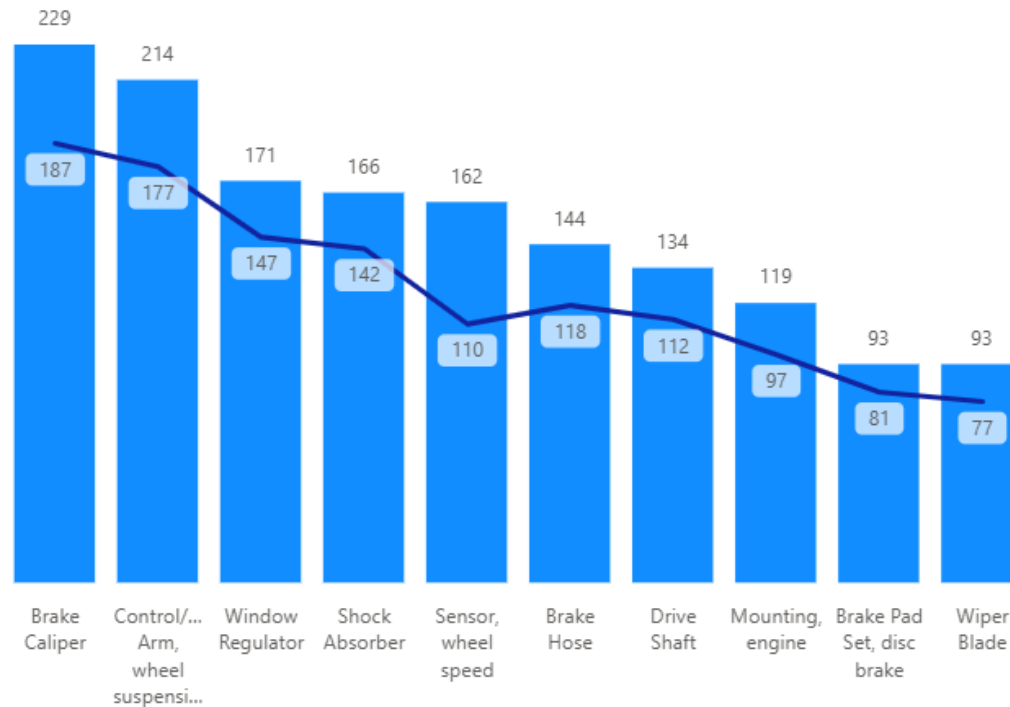
13

Total OE

4K

TOP 10 Generic Articles

● Total Number of Linkage ● Total Number of OE



Brand Details Dashboard

Brand品牌	Total K-Type	Total Articlegroup	Total OE numbers
BYD	8	66	776
CHERY	5	121	709
JAC	5	55	326
LIFAN	4	107	396
ZEEKR	4	52	328
AITO	2	79	183
HAVAL	2	98	186
NETA (HOZON)	2	50	223
AEOLUS	1	46	65
CHANA	1	3	6
JETOUR	1	101	203
LANDWIND (JMC)	1	65	104
SERES	1	60	109
Total	37	176	3606

03

Company News

- 2025 Automechanika Shanghai - a Successful Wrap-Up



2025 Automechanika Shanghai - a Successful Wrap-Up



From 26–29 November 2025, we exhibited at Automechanika Shanghai 2025. It was an incredible week – a great success and an excellent platform to connect with our existing customers and suppliers, as well as meet new potential partners from across the region.

We remain committed to setting the global data standard for the automotive aftermarket. At this year’s Automechanika Shanghai, we precisely focused on five core industry topics. Through collaboration between our global and regional teams, we demonstrated our forward-looking approach and unwavering commitment to driving industrial synergy:

Establishing a New Global Data Standard for Chinese Vehicles (ICE/EV/HCV)

Empowering Digital Transformation in Cross-Border B2B and B2C Trade

Deepening Intelligent Application of Repair, Maintenance, and Diagnostic Data

Creating Lifecycle Data and Catalog Solutions for Commercial Vehicles

Innovating localized TecCom Returns and Warranty China solution

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