

TecAlliance E-newsletter

Vehicles | New Energy Vehicles | Heavy Commercial Vehicles

Greater China

Version October 2025

01 Market Outlook

- China Mainland
- China Hong Kong
- China Taiwan

02 TecAlliance Data

- OES Data Overview

03 Company News

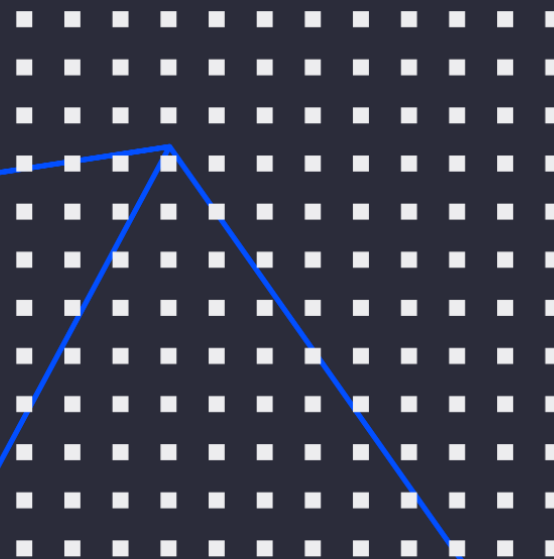
- 2025 China Marketing Communication Roadmap



01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



China Mainland Highlight Vehicle News

GAC Group has built the country's first high-capacity all-solid-state battery production line, with mass production expected as early as 2027

- The first large-capacity all-solid-state battery production line has been built domestically, and small-batch test production is currently underway.
- The biggest advantage of all-solid-state batteries compared to traditional lithium-ion batteries is that they contain no liquids, only solid-state materials. All-solid-state batteries allow future new energy vehicles to travel farther and be safer.
- With technical breakthroughs in the production line, the next step is industrialization and implementation. At GAC Group, the country's first high-capacity all-solid-state battery production line has been completed, becoming the first in the industry to have the conditions for mass production of automotive-grade all-solid-state batteries with a capacity of over 60 Ah.
- According to the company's R&D head, the currently developed solid-state batteries have nearly double the energy density of existing batteries. Vehicles with a range of over 500 kilometers could achieve a range of over 1000 kilometers after using them. The plan is to conduct small-batch vehicle installation tests in 2026, and between 2027 and 2030, gradually move to mass production.



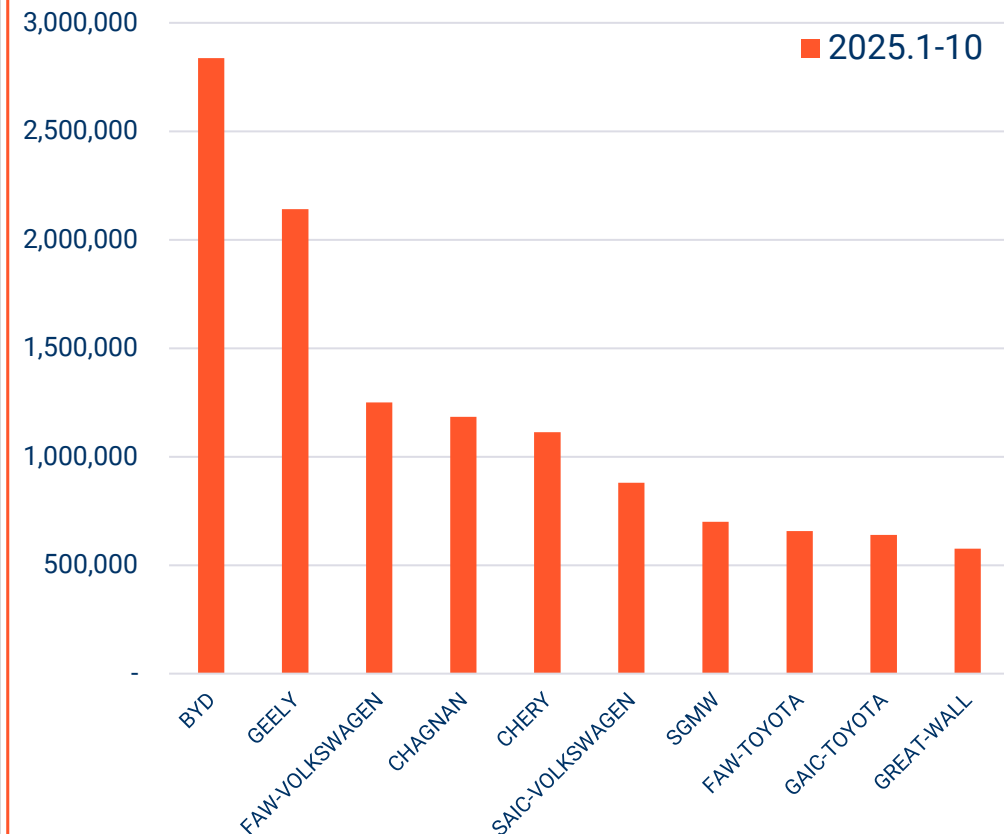
China Mainland Highlight Vehicle News

Top 10 manufacturer sales rankings in October 2025



Sales comparison

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



Hong Kong Highlight Vehicle News

Hong Kong August 2025 Vehicle News

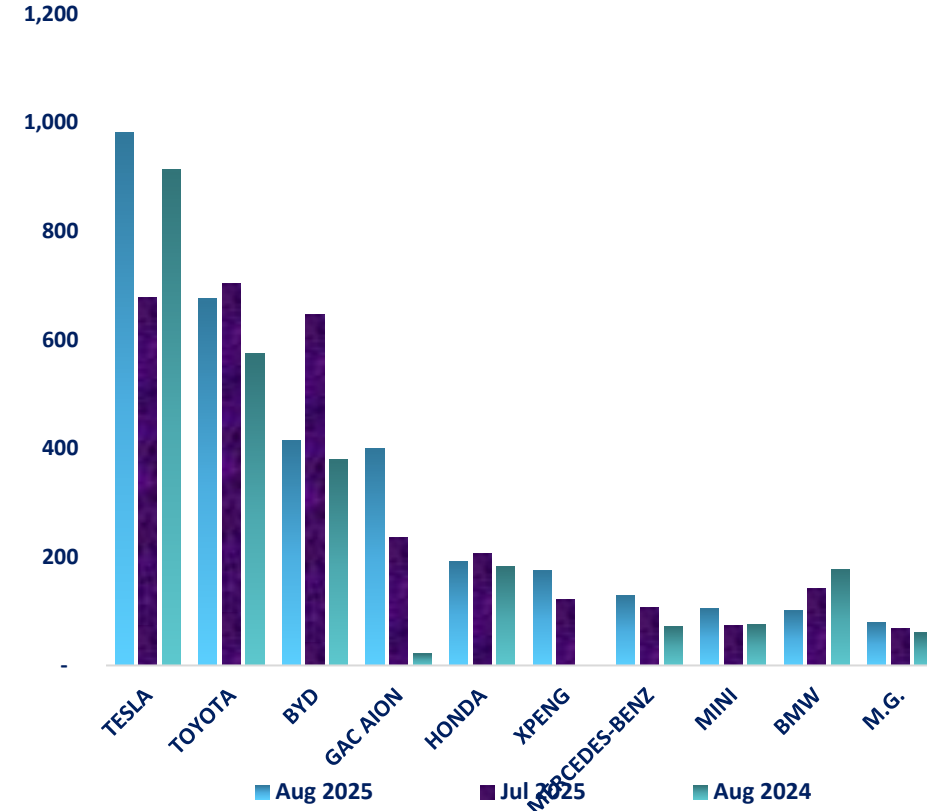
Hong Kong's passenger car sales in August 2025 reached 4,107 units, up from 3,893 units in July 2025, representing a month-on-month increase of 5.5%. TESLA sold 981 units, becoming the most popular car brand in Hong Kong once again. Toyota ranked second with 675 units sold, a month-on-month decrease of 4%; BYD's sales dropped 35.9% month-on-month, ranking third; GAC AION's sales increased 69.1% month-on-month, ranking fourth; and Honda ranked fifth with 192 units sold. From the overall market share perspective, the new energy vehicle market continues to expand in Hong Kong, and the penetration of mainland Chinese pure electric vehicles in the Hong Kong market has further increased.



■ Sales Comparison

Hong Kong's automotive market is becoming electrified

In August, Tesla took the top spot for car sales in Hong Kong, with Toyota ranking second with a monthly sales volume of 914 units, and BYD ranking third with 415 units. GAC AION came in fourth with 399 units, Honda was fifth with 192 units, and XPENG was sixth with 175 units. Mercedes-Benz ranked seventh, selling 129 units. MINI, BMW, and M.G. sold 105, 101, and 80 units respectively, ranking eighth, ninth, and tenth.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for October 2025



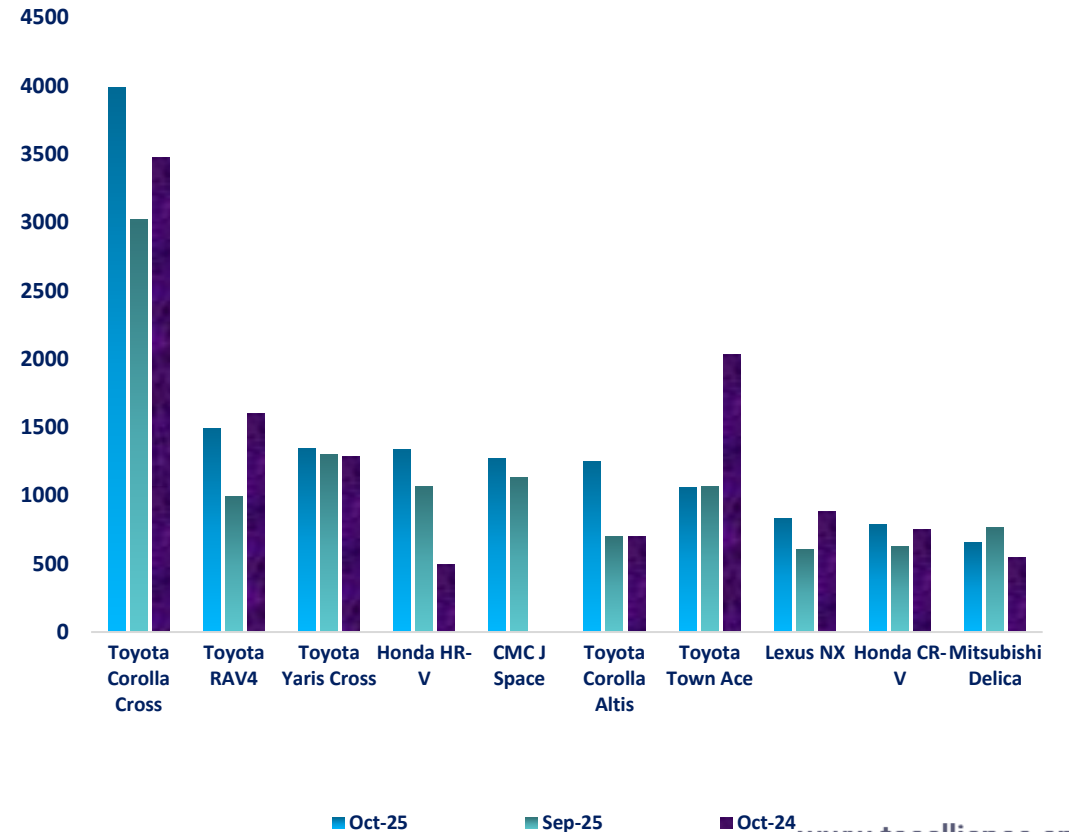
Continuing from the government's early September announcement of the extension of the NT\$50,000 vehicle tax reduction for trade-ins, with an additional incentive of a NT\$50,000 tax reduction for new passenger cars under 2.0 liters, along with proposals to extend the exemption of license tax and vehicle tax for electric vehicles until 2030, these favorable policies have helped revive new car sales in September. Subsequently, the October new car sales figures were released, with the total number of registered vehicles reaching 34,511 units for the month, representing a 7.1% increase compared to September. Although Tesla deliveries were affected by shipping schedules, dropping from 2,491 units in September to just 21 units in October, other brands still supported the overall market rebound. Major brands on the leaderboard all experienced varying degrees of growth, indicating that the overall new car demand continues to heat up, bringing rare positive news to the market.

Not only have policy benefits revived market demand, but as the end of the year approaches, automakers also need to carefully evaluate the pressure on existing inventory carrying over into the new year. Additionally, preparing for new model launches or facelifts has prompted manufacturers to be more proactive in clearing sales, hoping that measures such as price reductions and increased promotional incentives for new cars will boost sales in the final quarter of 2025, narrowing the gap with cumulative sales from the same period in 2024. Data indeed reflects this trend, with October 2025 cumulative sales reaching 87.6% of last year's figures for the same month, up from 86.1% in September, reducing the gap by 1.5%.

■ Sale Comparison

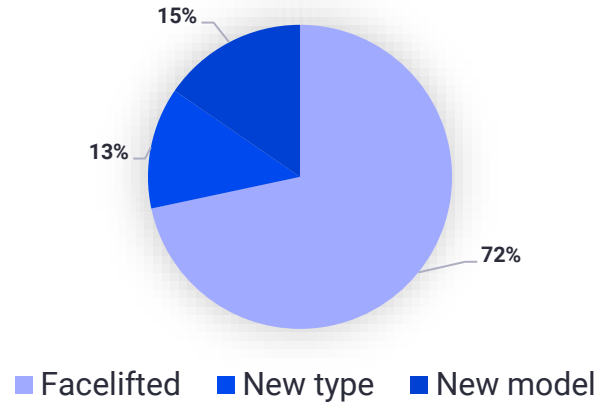
Overall new car sales continue to heat up

Toyota Corolla Cross and Toyota RAV4 took the first and second places in the market, respectively, achieving registration numbers of 3,988 and 1,492 units. Toyota Yaris Cross saw a 3.5% increase in sales compared to September, ranking third with 1,345 units. Honda HR-V sales rose 25.8% from September, ranking fourth with 1,338 units. CMC J Space ranked fifth with 1,271 units sold, while Toyota Corolla Altis ranked sixth with 1,251 units. Finally, Toyota Town Ace, Lexus NX, Honda CR-V, and Mitsubishi Delica ranked seventh, eighth, ninth, and tenth with 1,058, 835, 787, and 659 units sold, respectively.

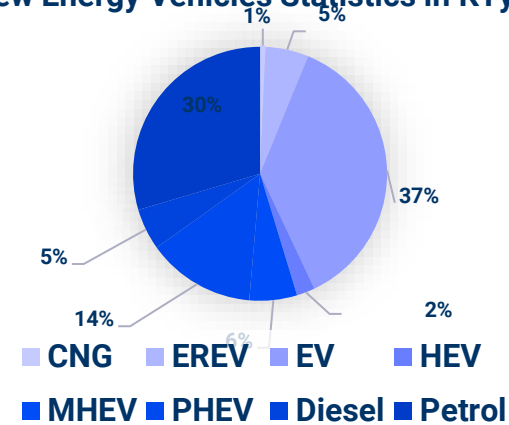


China JAN-OCT New Vehicle Analysis

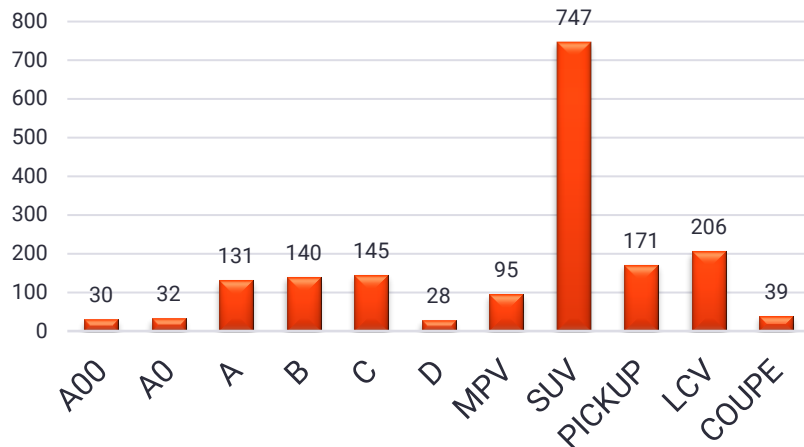
New vehicle statistics in KType



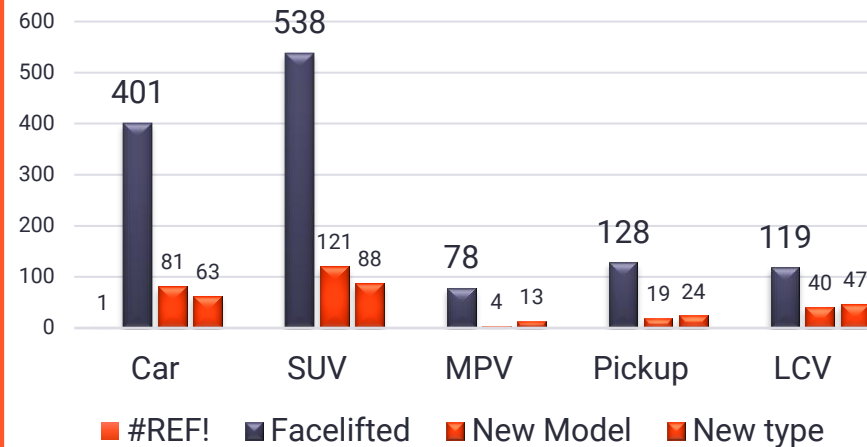
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. From **January to October 2025**, the total coverage of **K-Type** was **1764**, of which **500** 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	81
2	MERCEDES-BENZ	56
3	VW (FAW)	53
4	DONGFENG (DFAC)	49
5	CHERY	49
6	CHANA	48
7	JETOUR	46
8	MAXUS	45
9	CHANGAN	45
10	HONGQI	39
11	PORSCHE	33
12	VW (SVW)	31
13	FOTON	31
14	FENGXING	28
15	EXEED (CHERY)	28
16	JAC	28
17	AUDI (FAW)	27
18	DEEPAL	25
19	SKYWORTH	22
20	BMW (BRILLIANCE)	22
21	AVATR	22
22	BUICK (SGM)	21
23	ert	20
24	QIYUAN	19
25	LYNK & CO	19
26	AEOLUS	19
27	GEELY	18
28	JMC	18
29	WULING (SGMW)	17
30	HAVAL	17

#	Brand	Total
31	JINBEI	17
32	LEAPMOTOR	17
33	ISUZU (JIANGXI)	16
34	MERCEDES-BENZ (BBDC)	16
35	COWIN	15
36	GALAXY	15
37	GAC	14
38	ARCFOX	14
39	SRM (BRILLIANCE)	13
40	BESTUNE	13
41	TOYOTA (GAC)	13
42	GAC NE	13
43	IM MOTORS	13
44	FORD (JMC)	13
45	RADAR	13
46	AUDI	12
47	NEW BAOJUN	12
48	FARIZON AUTO	12
49	NAC IVECO (NAVECO)	11
50	XPENG	11
51	VOLVO ASIA	11
52	ROEWE (SAIC)	11
53	LEXUS	11
54	AUDI (SAIC)	10
55	TESLA	10
56	NIO	10
57	LAND ROVER	10
58	GREAT WALL	10
59	DONGFENG XIAOKANG	9
60	TOYOTA (FAW)	9

#	Brand	Total
61	BAIC-ORV	9
62	MG (SAIC)	9
63	TANK	9
64	BMW	9
65	VOYAH	9
66	NISSAN (DFAC)	9
67	HONDA (DONGFENG)	9
68	MINI	9
69	BAW	8
70	FANGCHENGBAO	8
71	HYPER	8
72	LUXEED	8
73	HONDA (GAC)	8
74	ZEEKR	8
75	LINCOLN (CHANGAN)	8
76	JMEV	8
77	LIXIANG	8
78	LINXYS	8
79	LOTUS	8
80	AITO	8
81	SMART	7
82	DENZA	7
83	KIA (DYK)	7
84	MAZDA (CHANGAN)	7
85	i CAR	6
86	CADILLAC (SGM)	6
87	JEEP	6
88	ISUZU (QINGLING)	6
89	JETTA	6
90	LANDIAN	6

#	Brand	Total
91	AITO	5
92	VGX	5
93	CAVAN	5
94	KARRY	5
95	RCEV	5
96	FORD (CHANGAN)	5
97	R AUTO	5
98	BENTLEY	5
99	ONVO	4
100	STELATO	4
101	RELY	4
102	XIAOMI	4
103	GENESIS	4
104	NISSAN (ZHENGZHOU)	4
105	PEUGEOT (DF-PSA)	4
106	JAC EV	4
107	YE	4
108	M-HERO	4
109	WEY	4
110	212	3
111	NAMMI	3
112	TOYOTA	3
113	YUFENG	3
114	YANGWANG	3
115	VENUCIA	3
116	MAEXTRO	3
117	SAIC	3
118	JAGUAR (CHERY)	3
119	ORA	3
120	VOLVO	3

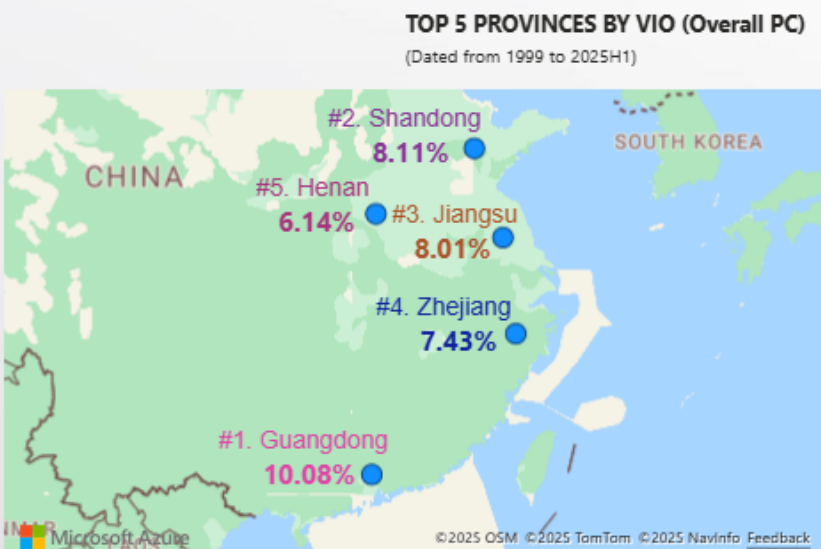
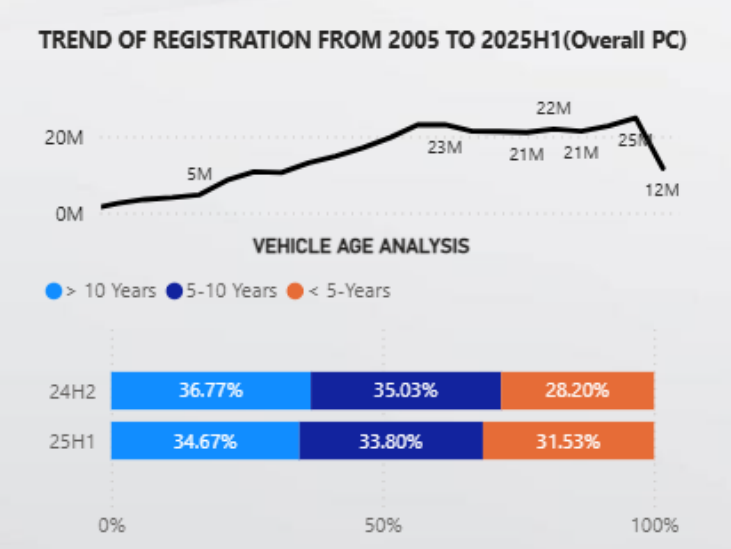
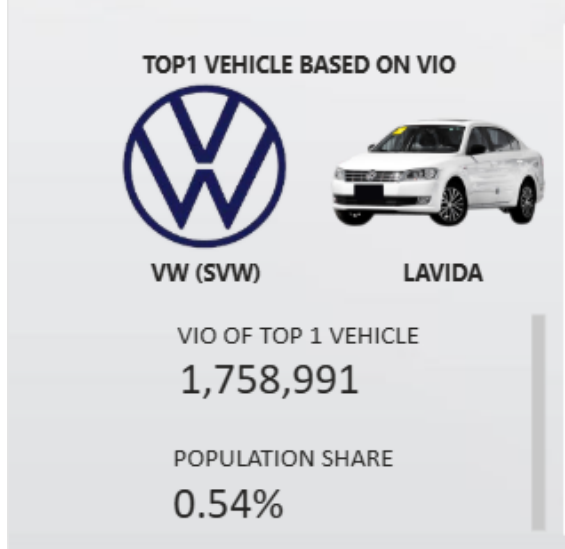
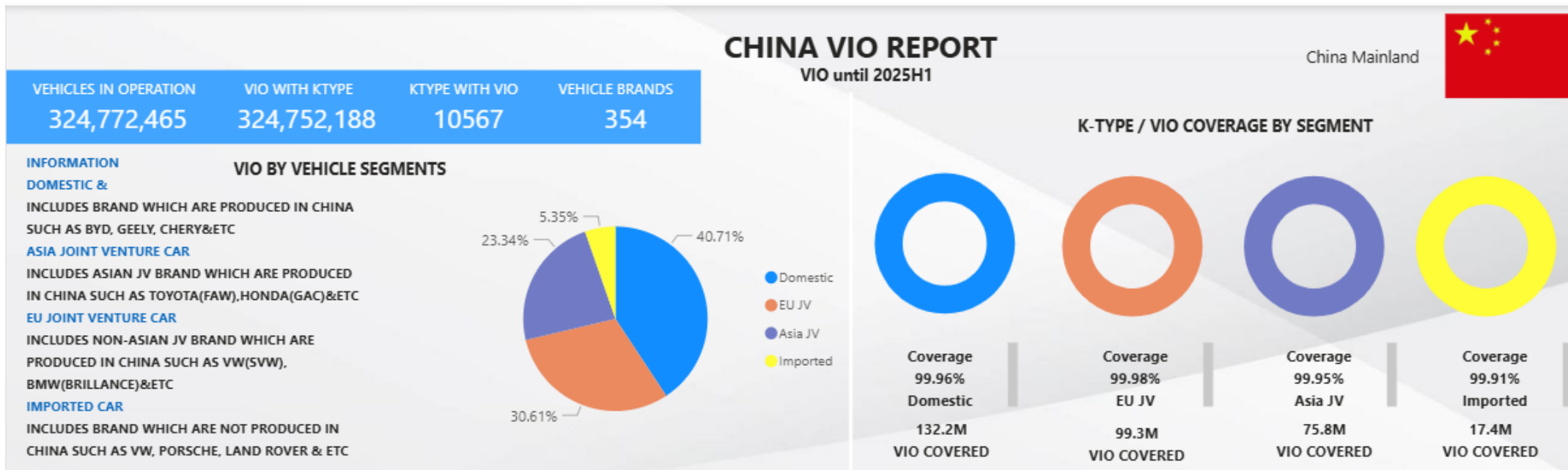
#	Brand	Total
121	HYUNDAI	3
122	REFINE	3
123	FIREFLY	3
124	CITROËN (DF-PSA)	3
125	SUBARU	3
126	BYD	2
127	LEVC	2
128	BAIC	2
129	JUNEYAO AUTO	2
130	VW (ANHUI)	2
131	VW	2
132	NEOMOR	2
133	VICTORY	2
134	SWM MOTORS	2
135	POLESTAR	2
136	HYUNDAI (BEIJING)	2
137	LIVAN AUTO	2
138	ZD	2
139	INFINITI (DFAC)	2
140	FENGON	2
141	FERRARI	2
142	KTM	1
143	VGX	1
144	LAMBORGHINI	1
145	LINGBOX	1
146	ROLLS-ROYCE	1
147	AISHANG	1
148	MERCEDES-BENZ (FJDA)	1
149	JETOUR	1
150	MAPLE	1

#	Brand	Total
151	LINGXI	1
152	MASERATI	1
153	HEDMOS	1
154	INEOS	1
155	LAND ROVER (CHERY)	1
156	SUZUKI	1
157	OSHAN	1
158	ALFA ROMEO	1
159	LETIN	1

Remarks:

All statistical data is based on K-Type. From **January to October 2025**, the total coverage of **K-Type** was **1764**, of which **500** were **New K-Type**.

China VIO Report

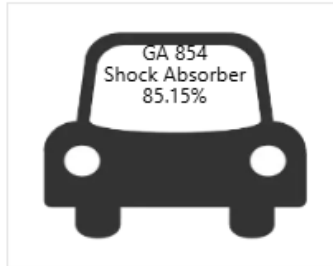


02

TecAlliance Data OES Data Overview



OE Coverage by VIO



NUMBER of Specific GA for NEV

10

NUMBER of GA for NEV & ICE

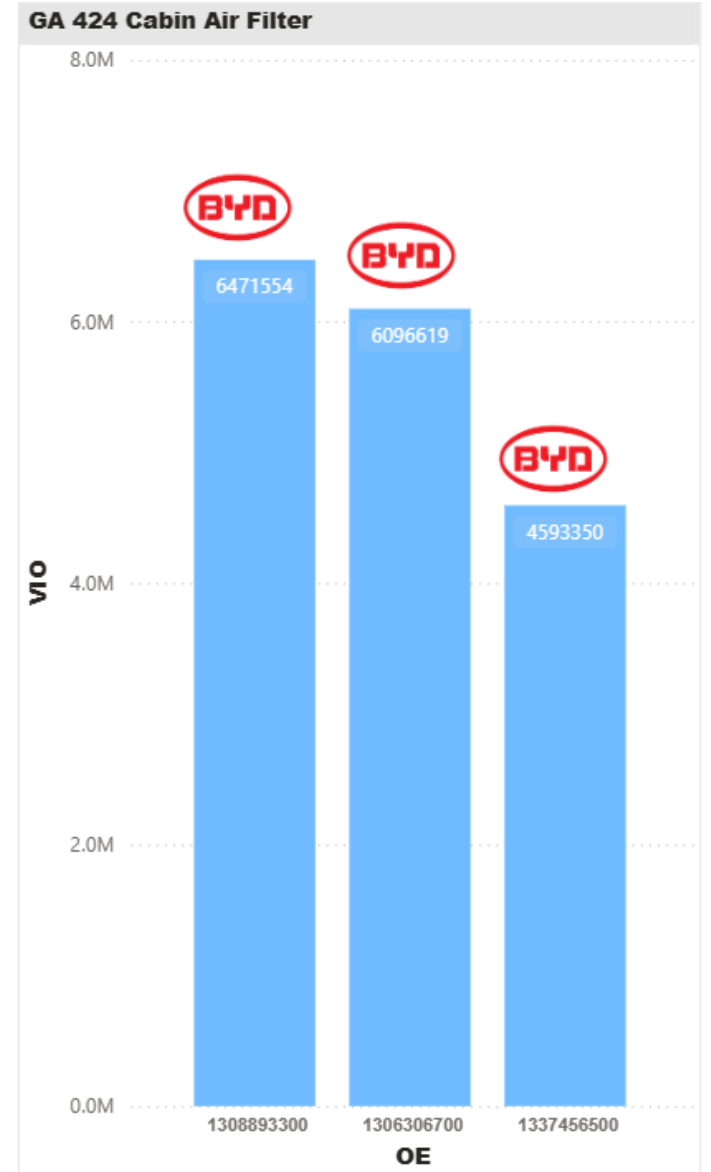
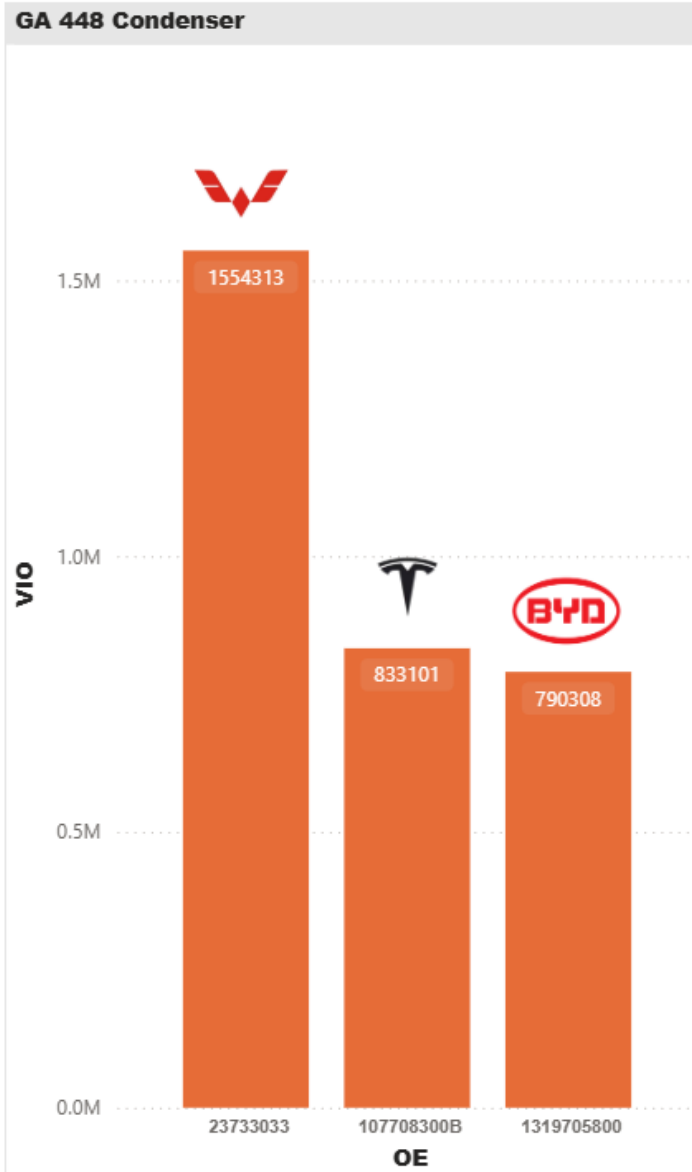
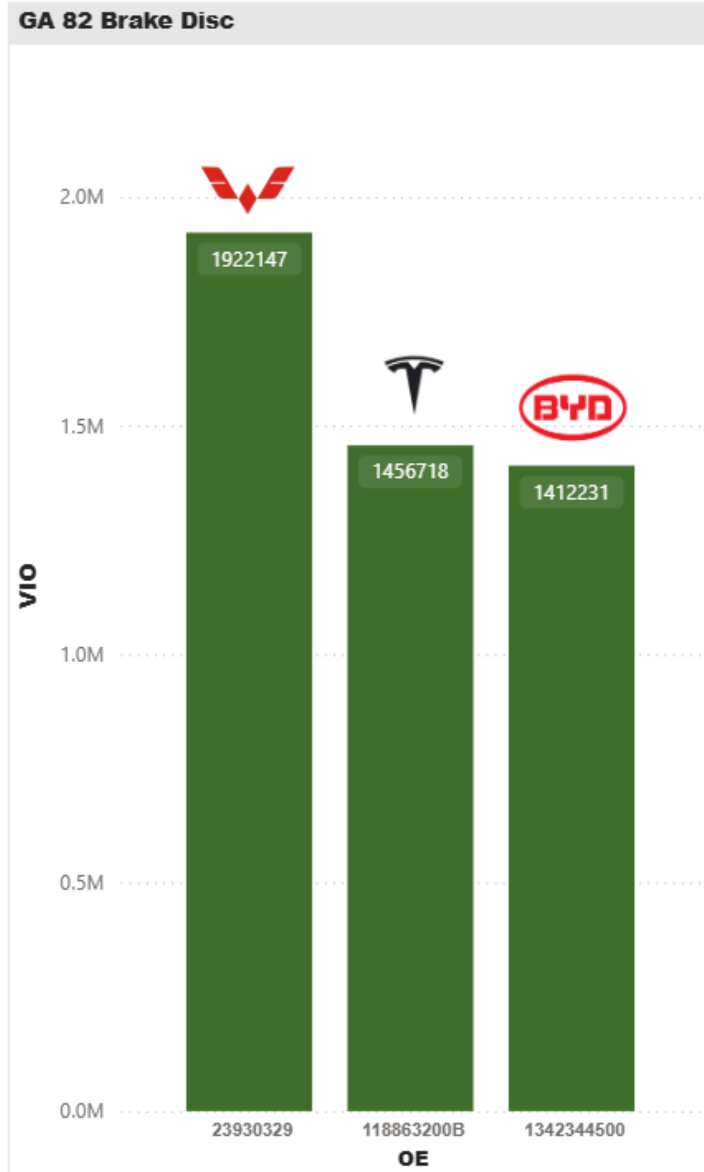
63

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
447	Compressors	86.56%
854	Shock Absorber	85.15%
286	Steering Gear	84.33%
273	Track Control Arm	83.99%
298	Wiper Blade	82.65%
424	Interior air Filter	82.24%
82	Disc	81.26%
402	Pad (disc brake)	81.22%
654	Wheel Bearing Kit	80.67%
1	Starter Battery	80.61%
78	Caliper cylinder (housing)	79.68%
83	Brake hose	79.37%
448	Condenser	79.21%
793	Electric Motor Blower	79.19%
13	Drive Shaft	78.10%
412	Sensor, wheel speed	77.47%
508	Radiator Fan Complete	76.51%
3229	Link,(Rod/Strut) stabilizer	72.34%
1561	Regulator>window	71.16%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
471	Evaporators	70.85%
1351	Additional Water Pump	67.73%
5031	Radiator, Drive Battery	67.50%
467	Heat Exchanger, interior heating	66.11%
219	Gas spring boot-/cargo area	65.71%
397	Expansion Tank, coolant	62.04%
1180	Suspension Strut Support Mounting	60.52%
1211	Steering Column	60.08%
183	Expansion Valve, air conditioning	56.26%
1182	Rubber Buffer, suspension	55.97%
3365	Cover/Rubber Boot, shock absorber	55.37%
914	Tie Rod End	55.00%
247	Mounting, engine	52.24%
1626	Friction Bearing	50.82%
2232	Wheel Sensor,tyre pressure control system	50.69%
258	Brake Master Cylinder	44.85%
200	Electro Motor, window regulator	40.93%
8558	Battery Pack/48 V Battery	37.07%
2462	Ball Joint,(Support-/Controlarm Link)	33.73%

NEV SEGMENT GA by VIO COVERAGE		
GA ID	GA Description	Coverage
2462	Ball Joint,(Support-/Controlarm Link)	33.73%
60573	Electromotor	30.38%
5761	Charge Cable, electric vehicle	30.11%
51	Axial Joint (steering)	28.82%
5314	Screw Set, brake disc	28.33%
60506	Inverter Converter	27.46%
514	Gas spring engine flap	26.93%
331	Bushing, stabilizer	24.17%
60172	Charger, Traction battery	23.70%
191	Bellows (steering)	23.03%
851	Receiver Driers	20.44%
123	Drum	20.22%
70	Shoe (drum brake)	19.53%
60173	Control Unit, battery management	17.56%
655	Wheel Bearing	17.14%
251	Control Arm-/Trailing Arm Bush	16.87%
194	Boot Kit, Drive Shaft	16.28%
124	Primary handbrake cable	15.74%

Top 3 Coverage of OE by VIO



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