

TecAlliance E-Newsletter

Greater China

Version February 2026

联系我们



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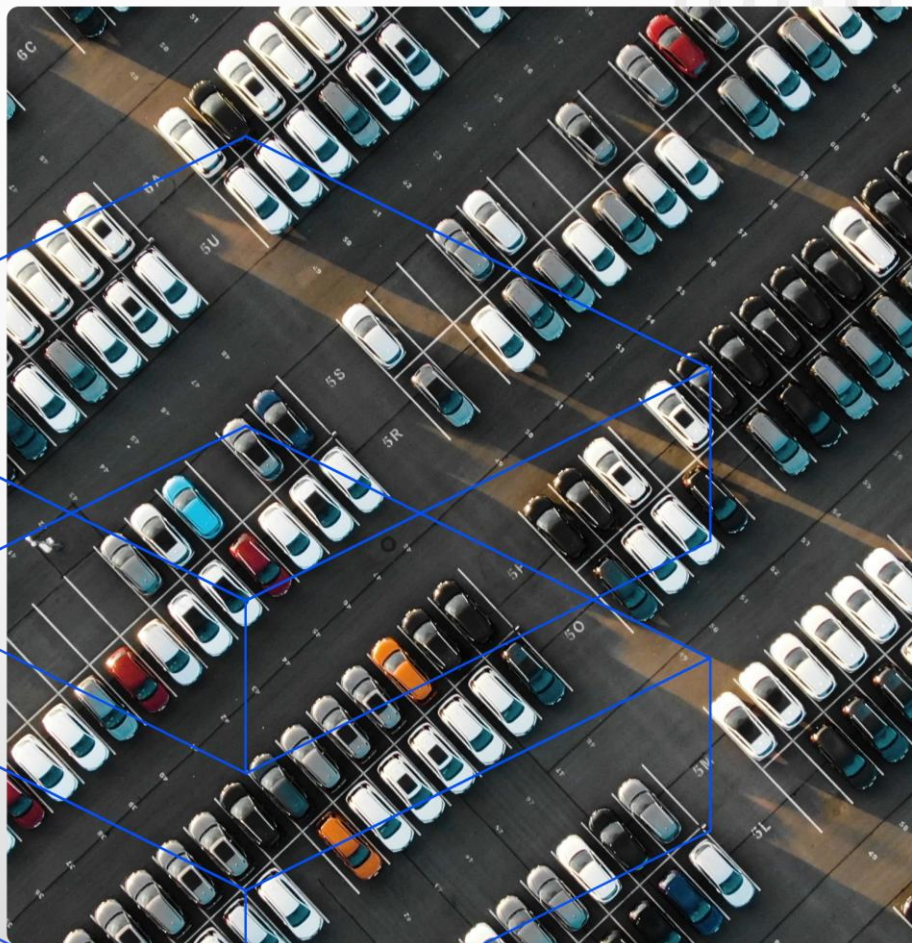
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01



Market Outlook

- PC China Mainland
- PC Hong Kong and Taiwan
- Chinese Brands' PC Overseas VIO 2024
- Chinese Brands's CV Overseas VIO 2024-2026

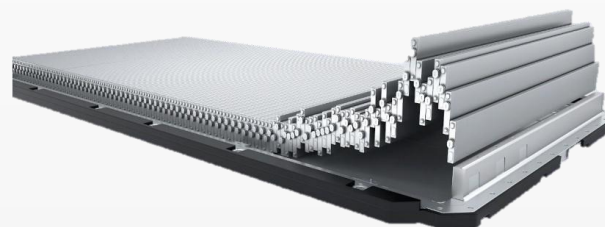
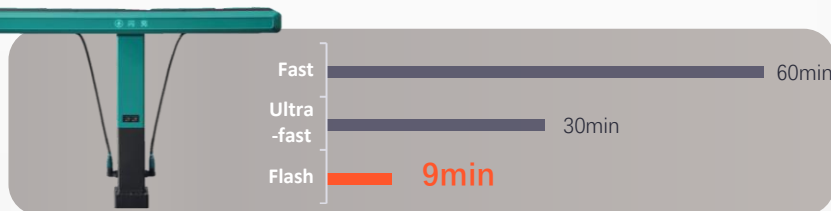
Discussion on Hot Topics China Mainland

BYD's matrix brands equipped with the Blade Battery, in conjunction with the global flash charging rail-mounted T-type charging post makes it possible, under normal temperature conditions, "charging to ready" (10%-70%) takes **only 5 minutes**, and "charging to full" (10%-97%) takes **only 9 minutes**, with the remaining 3% reserved for regenerative braking. In extremely cold environments, it takes only 3 minutes longer.

Technological innovation enables flash charging to reach full capacity in just 9 minutes.

...safety standards, building the safest battery by exceeding national standards by ten times.

... 10 models are the first to be equipped with the Blade Battery, with the pure electric range reaching up to 1,036km.



10%-97% Charging to full

Shenzhen 17°C-24°C

Fangchengbao Ti 3	8m45s	Fangchengbao Ti 7	9m05s
Song Ultra	8m47s	Yangwang U8L	9m07s
Seal 06	8m47s	Denza Z9GT	9m08s
Seal 07	8m47s	Yangwang U7	9m23s
Denza N9	9m3s	Tang	9m24s



20%-97% Charging to full

Harbin -20°C

Yangwang U7	10m29s	Yangwang U8L	10m55s
Seal 07	10m36s	Tang	10m56s
Seal 06	10m44s	Fangchengbao Ti 7	11m10s
Fangchengbao Ti 3	10m47s	Denza Z9GT	11m24s
Song Ultra	10m53s	Denza N9	11m53s

Note(Data Source): 比亚迪第二代刀片电池暨闪充技术发布会

Test item

New National Standard

BYD standard

Safety after fast charging cycles

After 300 fast-charge cycles, the battery does not catch fire or explode when subjected to an external short circuit.

After 500 cycles of rapid charging, an external short circuit does not cause the battery to ignite or explode.

Thermal diffusion

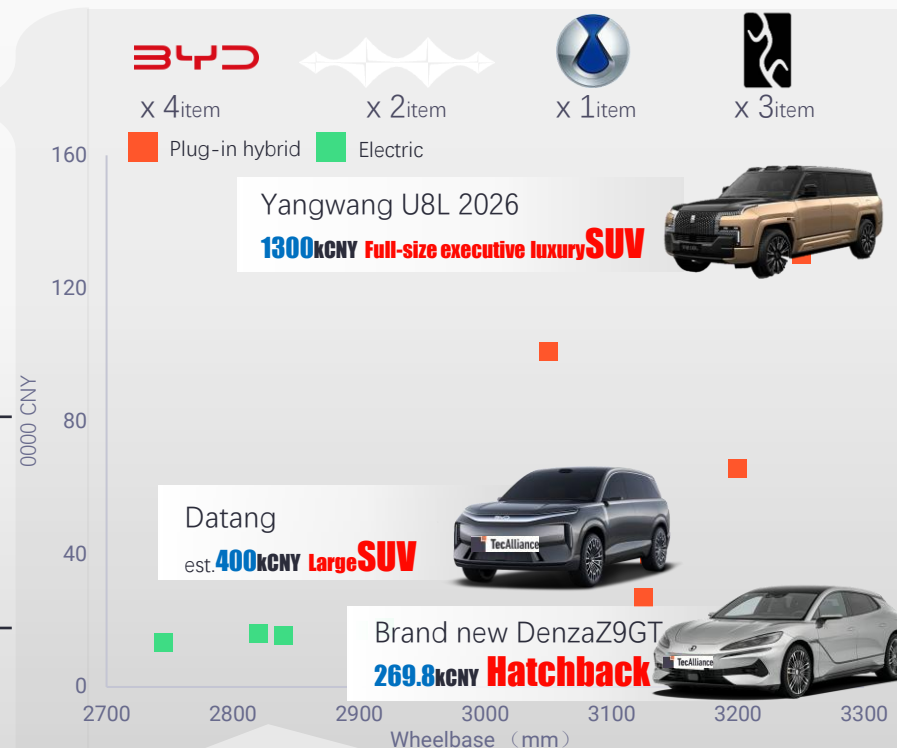
Triggering a short circuit in one cell does not cause ignition or explosion.

Simultaneous short circuit of four cells does not cause ignition or explosion.

Bottom impact

150 J bottom impact does not cause the battery to ignite or explode.

Up to 1500 J bottom impact does not cause the battery to ignite or explode.



Over 70% of the newly released models are SUVs. Except for the Tang, all Dynasty series models are pure electric, with prices ranging from 130k to 180k RMB. The Fangchengbao series has undergone a full-line price reduction and upgrade. The Yangwang series continues its sporty luxury positioning, with upgrades to the torque control system and range capabilities. Looking at the overall brand matrix, it has enhanced user safety levels and privacy protection, while significantly reducing range anxiety for pure electric vehicles.

Hong Kong and Taiwan Highlight Vehicle News

Taiwan and Hong Kong Market Overview

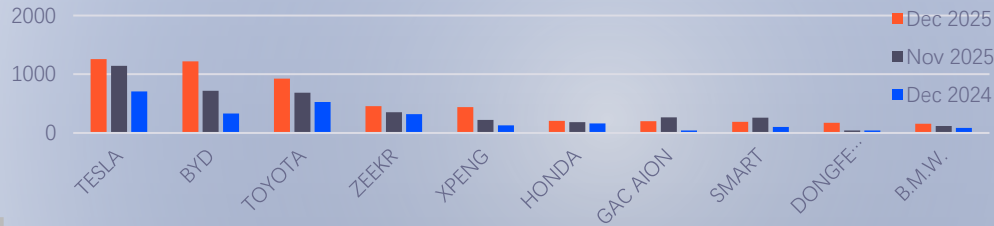
In December 2025, the total car sales in Hong Kong reached **6,337** units, with domestically-produced new energy vehicles performing excellently in the territory. Taiwan sales in February 2026 amounted to **22,043** units, and the total sales for 2025 showed a 9.5% decline compared to 2024.

HK

December 2025 Automotive Market Brand Sales and Production Analysis

Sales growth is robust, and the transition to new energy is the core driver

In December 2025, Hong Kong's automobile market total sales reached 6,337 units, representing a growth of about 27.5% compared to November 2025 (4,967 units) and a significant increase of 76.8% compared to December 2024 (3,584 units). New energy brands (such as TESLA and BYD) contributed the main body of the sales growth, with the new energy vehicle penetration rate expected to exceed 70%.



Tesla leads in sales with steady growth

TESLA leads the pack with 1,260 units, holding a market share of about 19.9%, up 9.9% from November. BYD sold 1,220 units, with a massive 69.7% increase from November. Toyota sold 925 units, up 35.4% from November. Overall sales remain on a stable growth trajectory.

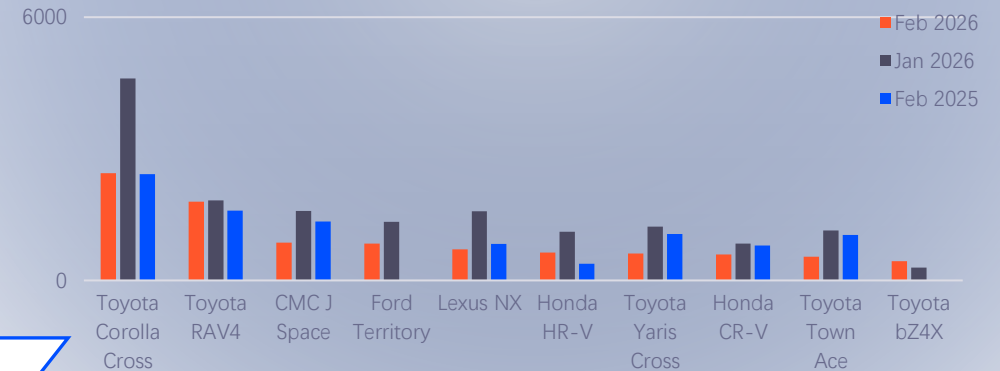


TW

February 2026 Taiwan Automobile Market Production and Sales Analysis

Buying momentum has somewhat declined, and the market is facing a more competitive situation

The total cumulative sales volume in February 2026 reached 22,043 units, representing only 62.8% of the sales scale in January. However, since Chinese New Year fell later this year, Spring Festival holiday lasted from February 14th to 22nd, followed immediately by the 228 Peace Memorial Day holiday starting February 27th. Consequently, the actual working days for vehicle registration in February were only 14 days. The reduced number of registration days, combined with the dealership system's rest during Chinese New Year holidays, were the main reasons for the significant decrease in the new car market sales scale in February.



Note (Data Source): Transport Department of the Government Hong Kong Special Administrative Region, [U-CAR](#) News

Overview of Overseas Chinese Brands' PC VIO - as of the end of 2024

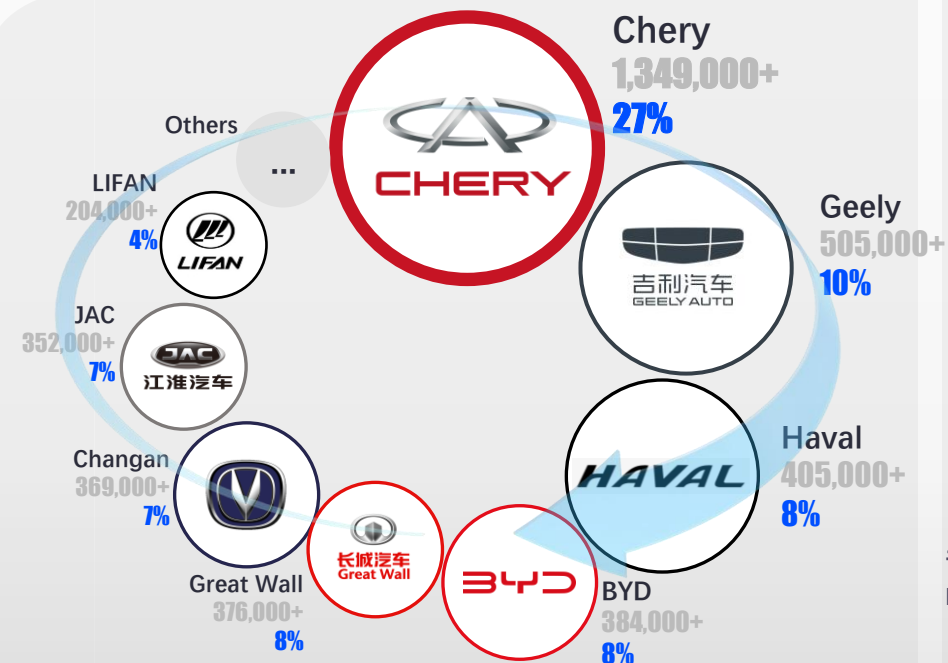
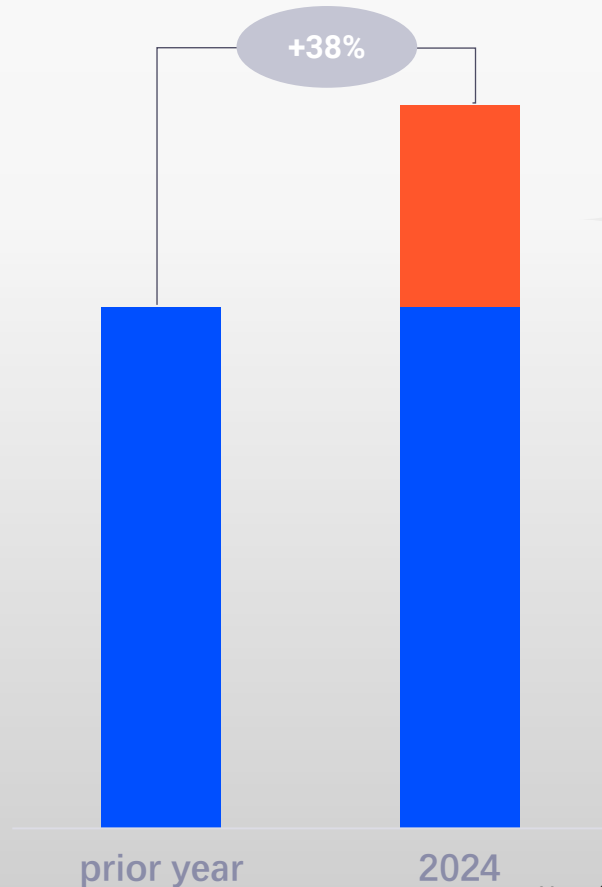
Chinese Local Brand for Personal Car Overseas VIO Data

#1 The total number of Chinese vehicles exported reached nearly 5 million, a YoY increase of 38.7%.

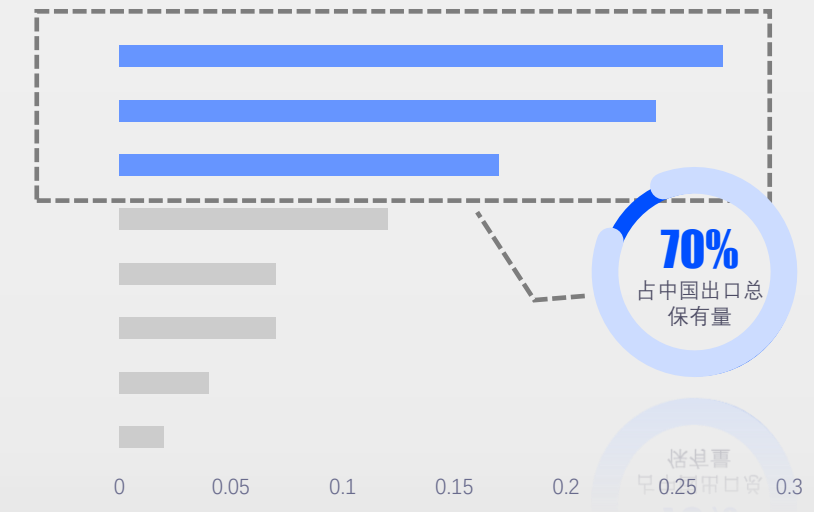
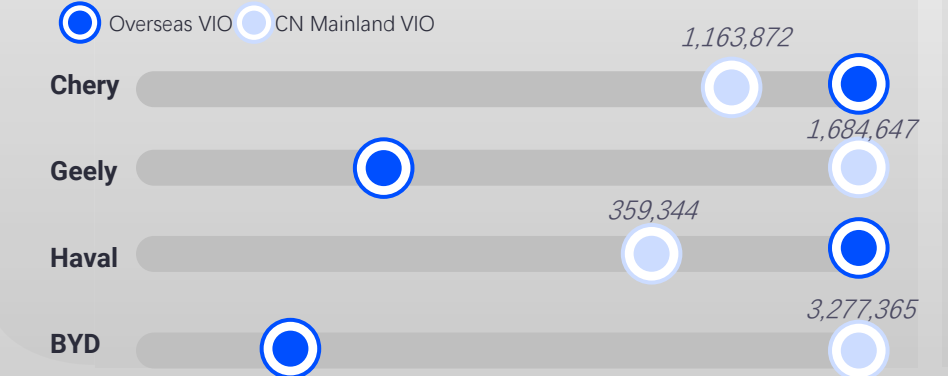
In 2024, Chinese domestic brand passenger vehicle exports totaled over **4,962,000 units**, representing a **38%** increase compared to 3,577,000 units in 2023. This demonstrates outstanding performance amid turbulent global trade conditions.

#2 ...Among them, Chery accounted for over a quarter, becoming the vanguard of Chinese automotive companies going global.

#3 ...The Russian, South American, and Middle Eastern markets together account for 70% of the total volume.

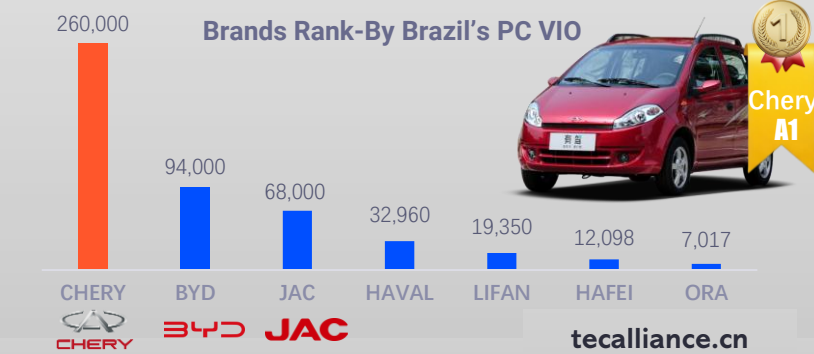


Among them, the overseas VIO of Chery and Haval has already exceeded their ownership in mainland China.



#4 ... South America, comprising of 10 countries, is the region with the highest concentration of Chinese brands.

The total ownership of Chinese brand passenger vehicles exported to South America reached 1,180,333 units. Brazil ranked first in South America for Chinese brand vehicle ownership with over 507,000 units, followed by Chile in second place and Peru in third.























Note (Data Source): TecAlliance global VIO data 2024H2

Chinese PC Brands Overseas Performance - Chery's Success Story

Chery's Successful Stories Referring to Overseas Market

Top 20 Countries buying Chery's Vehicle

Rank on Chery's Exported Vehicles		Units	Share
1	 Russia	517k	34.65%
2	 Brazil	262k	17.56%
3	 Chile	84k	5.63%
4	 Turkey	73k	4.89%
5	 Ukraine	52k	3.49%
6	 Malaysia	36.49k	2.45%
7	 South Africa	36.41k	2.44%
8	 Egypt	31.2k	2.09%
9	 Peru	27.6k	1.85%
10	 Ecuador	22.7k	1.52%
11	 Uruguay	20.8k	1.39%
12	 Argentina	20.2k	1.35%
13	 Indonesia	17.6k	1.18%
14	 Mexico	15.6k	1.05%
15	 Israel	15.3k	1.03%
16	 Colombia	14k	0.94%
17	 Kazakhstan	12.97k	0.87%
18	 Philippines	12.93k	0.87%
19	 Australia	10k	0.67%
20	 Thailand	7.8k	0.52%

1,492,000+

Chery Group's PC Overseas VIO in 2024

No. 1 Tiggo 7 Pro



开瑞汽车

982
0.07%

JETOUR

29,347
1.97%

JACCOO

33,177
2.22%

EXEED

57,434
3.85%

OMODA

69,277
4.64%



CHERY

1,449,114

0.7%

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Note (Data Source): TecAlliance global VIO data 2024+

Overview of Overseas VIO for HCV of Chinese Brands

Chinese Brand Commercial Vehicles Overseas VIO Data



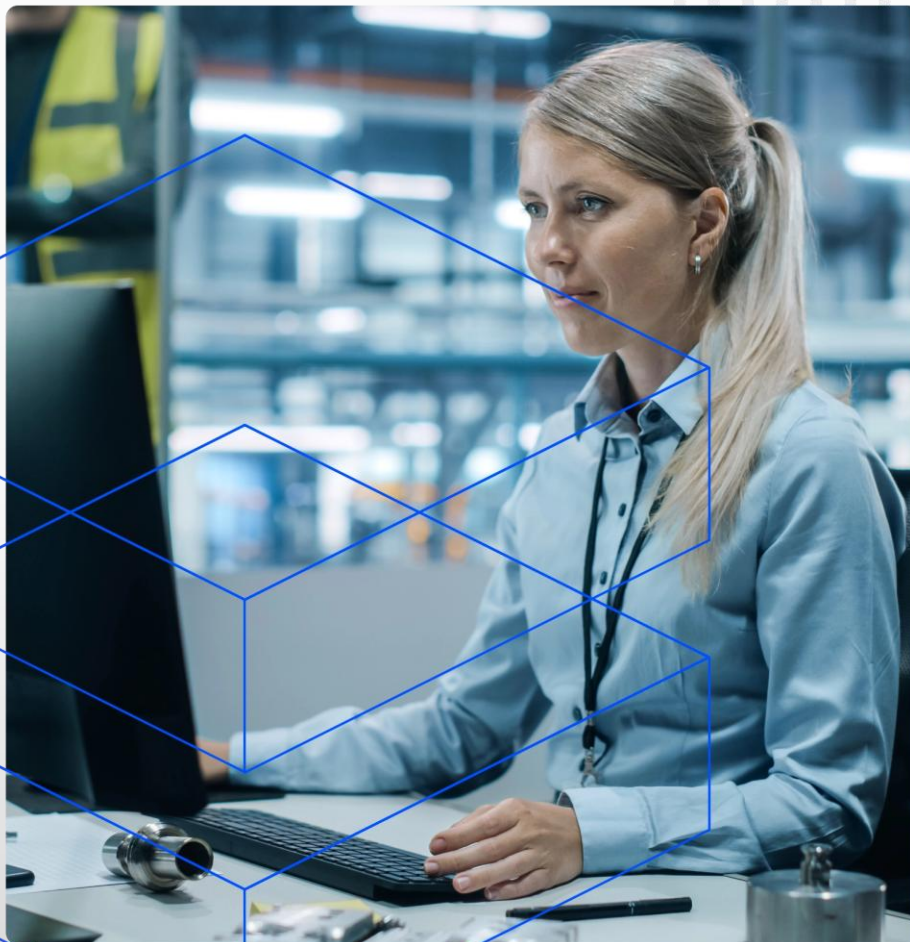
covered **80%+** HCV VIO Overseas

Covered **80+** Countries

Covered **4** domestical Chinese Brands



02



TecAlliance Data

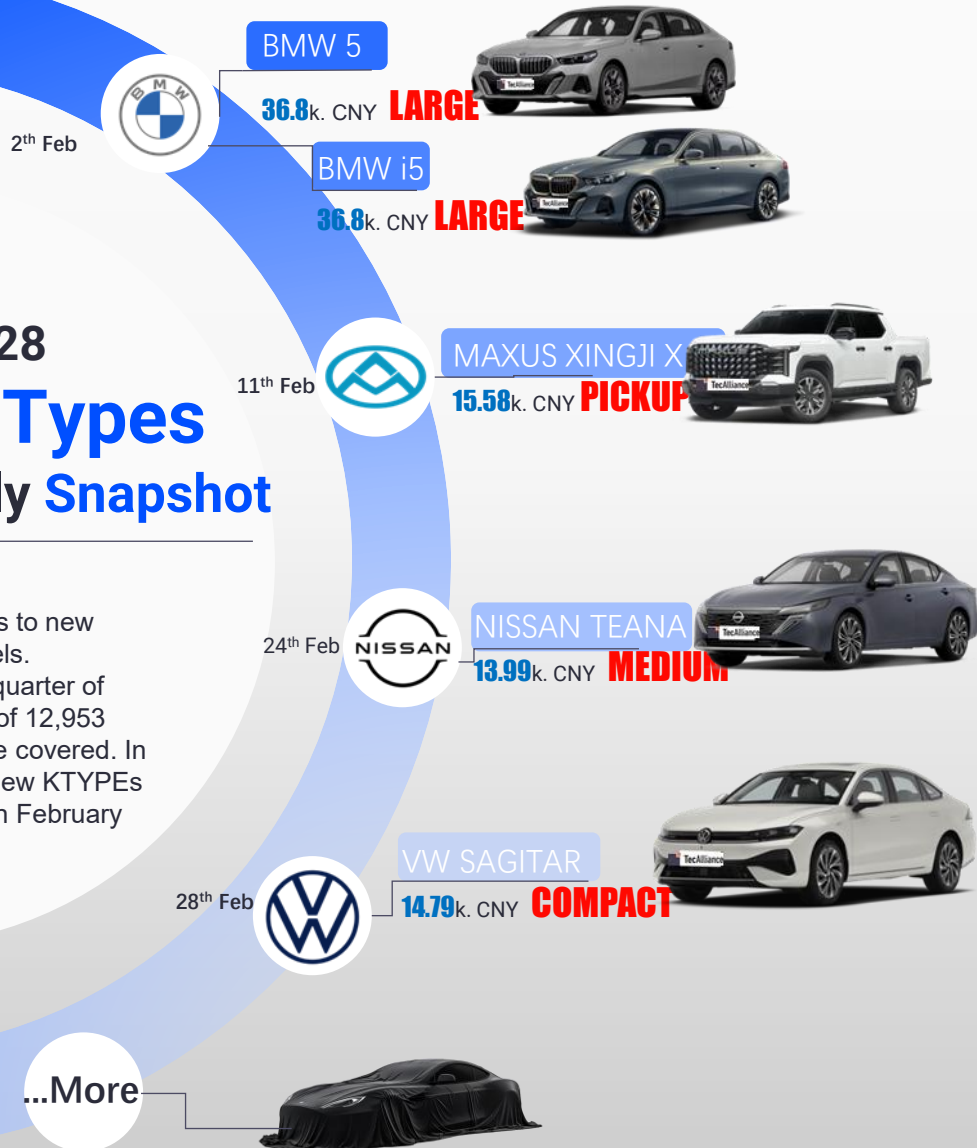
- PC/LCV
- Original Equipment Research

Overview of New Added Vehicle(KType No.) 2026

In February 2026, TecAlliance China added a total of **51** KTypes, including **45** facelifts (model year updates or configuration optimizations), **4** new model (new displacement or power options), and **2** new types

2026 2.01-2.28 New Types Monthly Snapshot

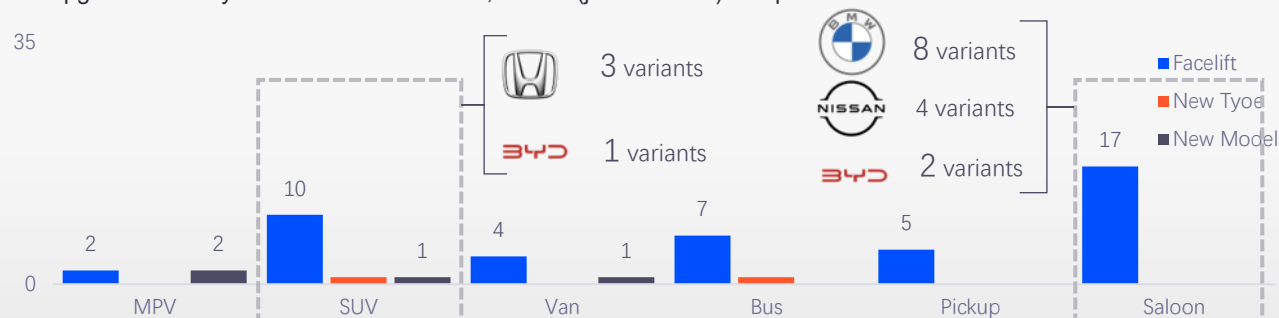
Note:
"Model" refers to new KTYPE models.
In the fourth quarter of 2025, a total of 12,953 KTYPEs were covered. In addition, 51 new KTYPEs were added in February 2026.



Distribution of Facelifts and New Models

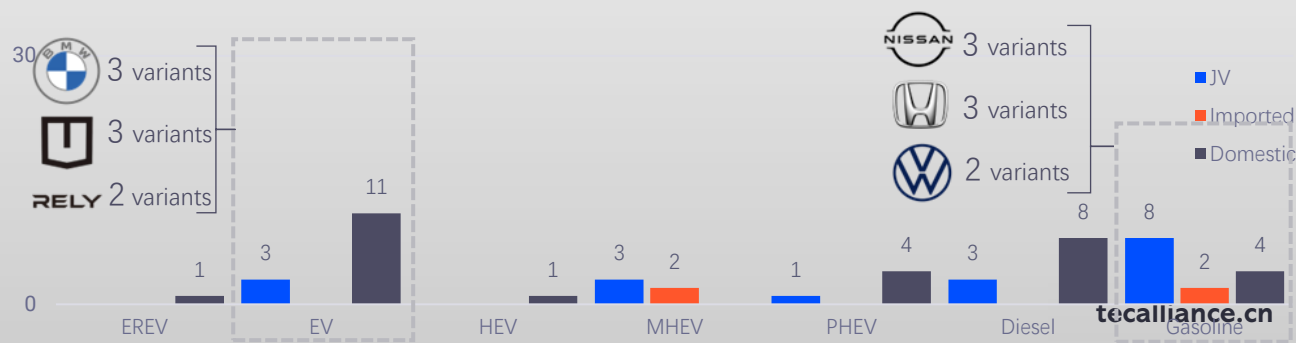
Body Type

Among the newly added KTypes, over 30% were saloon models. BMW (both imported and joint venture) completed upgrades for 8 saloon models during the month, while Nissan (joint venture) also accelerated its upgrade process, completing 4 saloon model upgrades. Nearly 20% were SUV models, Honda (joint venture) completed 3 iterations.



Fuel Type

Among the newly added KTypes, 25 models were updated for gasoline and diesel combined, slightly leading over pure electric models at 14. Among the upgrades, domestic brands took the lead and covered all fuel types, with traditional fuel types also not being neglected, but showing particularly outstanding performance in pure electric.

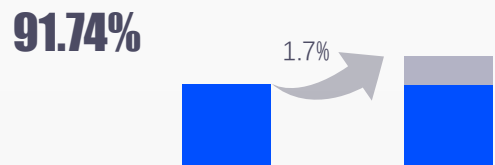


Overview of OE Research Quarterly Progress

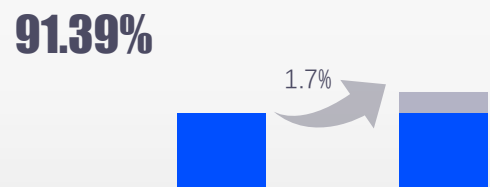
China Mainland OE Research Progress Overview

#1 The average coverage rate of all available parts reached **90.04%**, below are the quarterly changes for each group compared to the last quarter.

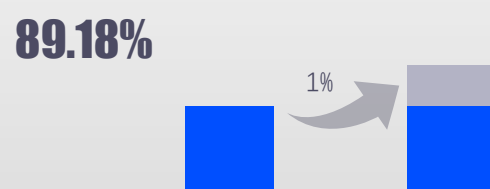
Cooling for sale **30** parts available **Steering & Suspension** for sale **28** part available



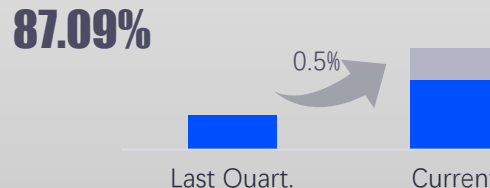
Braking & Hydraulics for sale **25** part available



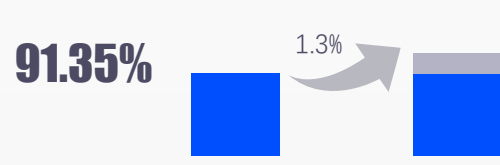
Engine & Sealing Products for sale **63** part available



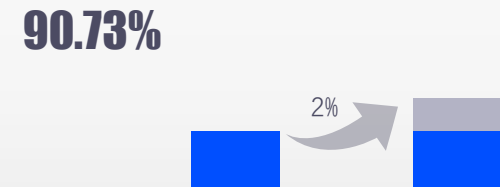
Exhaust for sale **16** part available



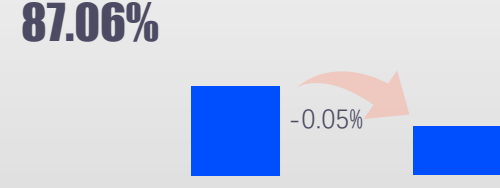
Steering & Suspension for sale **28** part available



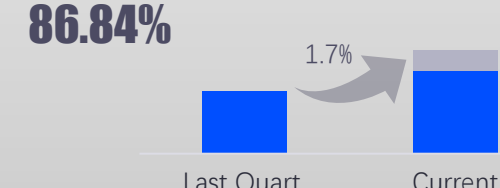
Ignition for sale **25** part available



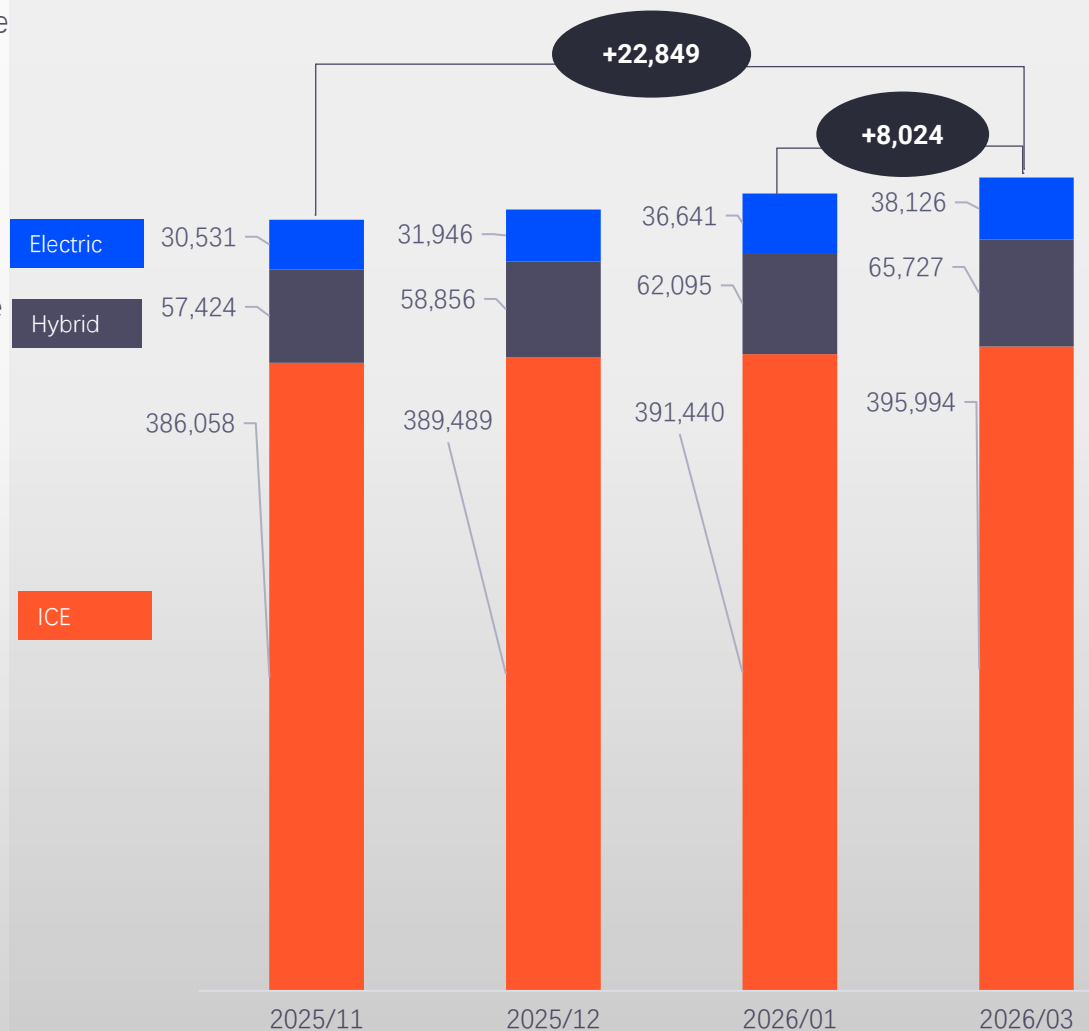
Electrified for sale **10** part available



Glazing for sale **2** part available



#2 **Original Equipment number** accumulates at **466,076**, below are the quarterly change of it (by fuel type)



Overview of Chinese OE Research Progress-2025 New Added

TA CN Parts Research Dive in 2025 New-Added Generic Article

In 2025, a total of **4** category groups and **15** categories were newly added to the mainland China OEM parts research. The research progress was intensive, with the number of **OEM parts exceeding 6,000** in each case, and the average ownership coverage rate reached over **90%**.

New Parts	New Parts Number and Description	Example Pictures	OE Number	VIO AVG CVG	Quarterly Progress	
Braking & Hydraulics	[5] Joint Kit, drive shaft		9,708	93.1%		
	[236] Joint, drive shaft					
	[3675] Propshaft, axle drive					
Cooling	[4921] Parts kit, automatic transmission oil change		8,608	89.8%		
	[3324] Oil Separator, crankcase ventilation					
	[475] Radiator Hose					
Engine & Sealing Products	[443] Piston		6,788	92.1%		
	[444] Piston Ring Kit					
Ignition	[3926] Mass Air Flow Sensor		7,330	91.43%		
	[3927] Volume Air Flow Sensor					
	[3947] Sensor, intake manifold pressure					
	[7838] Sensor, headlight levelling					
	[4272] Sensor, exhaust pressure					
	[592] Oil Sump					
	[3105] Oil Sump, automatic transmission					

ICE Parts
 EV Parts
 Share parts

03



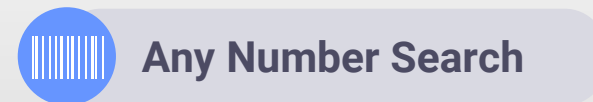
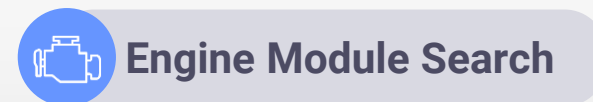
TecAlliance Solution

- HCV Catalogue



Global Standard HCV Parts Data Platform

We have integrated high-quality HCV model data resources and official accessory product parameters for you, accurately and efficiently providing the following key functional items:



Key Function of HCV Catalogue

01 Diversified search methods

Tailored for commercial vehicles, it builds full-chain query capabilities including six-level model retrieval, VIN code (with OCR), and engine module queries, covering the diverse query needs of the industry.

03 Accommodating Different Brand Visuals

Multi-dimensional elements such as query navigation, site logo, product status icons, and text can be customized, allowing for quick adaptation to different brand visual styles and requirements.

02 Innovative Adaptation Model

Addressing the structural characteristics of commercial vehicles, the innovative "Part-to-Module" adaptation model has been introduced. The precise adaptation for engine modules has already been implemented, offering strong scalability in data structure.

04 Adaptation Error Correction Feedback

A feedback system combining user-friendly submission with backend work order processing, enabling one-click error reporting on the front end and work order-based tracking on the backend.



03



Global Data Suppliers

- 2025 February

Welcome Onboard 2026 Feb



TecDoc®
DATA SUPPLIER



1-GNC
Granning

ADR – Sakura Filter
MOTAIR TURBO

AG ARTS
Pobjeda

CLIMTEX
RM Brake Disc & Drum

CIDAK
TAS

CX
WEGA

04



Marketing Activities

- 2026

Meet Us! – TecAlliance Marketing Activities for 2026

TecAlliance China Marketing Activities of the year 2026

Mar.

26th
Strategy meeting - Customers Salon

May.

14th -16th
AMR - Auto Maintenance and Repair Expo (Beijing)

14th -16th
CAPAS-International Trade Fair for Automotive Parts & Aftermarket Services (Chengdu)

27th -28th
China Data Supplier Conference & Customer Training Workshop (Shanghai)

Apr.

13th- 15th
AMR - Auto Maintenance and Repair Expo (Beijing)

Jul.

16th
Strategy meeting - Customers Salon

Jun.

18th -20th
Automechanika Ho Chi Minh City

Aug.

19th- 21st
AAG - Auto Aftermarket (Guangzhou)

Sept.

3rd -5th
International Auto and Motorcycle Expo (Wenzhou)

8th -12th
Automechanika Automechanika Frankfurt

24th -27th
Automechanika Jakarta

Nov.

3rd -5th
Automotive Aftermarket Products Expo (AAPEX) Las Vegas

10th -12th
Automechanika Dubai

Dec.

2nd -5th
Automechanika Shanghai (AMS)

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Your voice counts!

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**Werner
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Commercial Team

**Customer Centricity,
creating tangible
customer value.**



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