

TecAlliance E-newsletter

Vehicles and
New Energy Vehicles

Greater China

Version March and April 2024

30 YEARS

TecDoc

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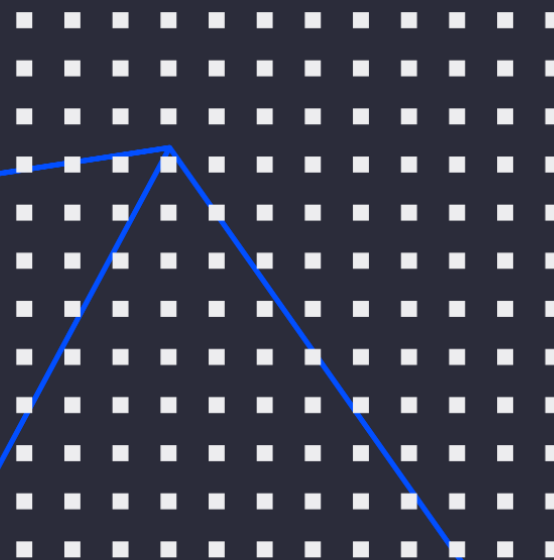
- Highlights of TecAlliance China participation in 2024 Auto Parts Carnival Summit Forum
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01

Market Outlook

China Mainland
China Hong Kong
China Taiwan



Nissan and Honda plan to significantly reduce production capacity in China



- According to media reports, Nissan and Honda are planning to reduce production capacity at their joint venture factories in China, with Nissan planning to cut production capacity by 30% and Honda planning to cut production capacity by 20%. It is reported that the reason why the two car companies made the above decision is because the Chinese market is rapidly transitioning to new energy, and the problem that Japanese car companies need to face is the adjustment of their strategy in China.
- Although the sales performance of the two car companies was decent at the beginning of this year, the increasing price war of new energy vehicles among Chinese car companies since the New Year has brought chill to the two companies. Especially in 2023, both car companies experienced a decline in sales, with Nissan's annual sales in China reaching 793700 units, a year-on-year decrease of 24%. Honda's sales in China in 2023 were 1.2342 million units, a year-on-year decrease of 10%.
- Mr. Makoto Uchida, President and CEO of Nissan Motor Corporation, said, "We will take strategic measures to improve our business performance in the Chinese market and plan to launch four new energy models in the Chinese market starting from the second half of 2024." On the other hand, Masashi Matsuyama, General Manager of Nissan (China) Investment Co., Ltd., said, "Nissan is considering exporting its fuel vehicles produced and developed in China, as well as its upcoming pure electric and hybrid vehicles, to overseas markets."
- Honda China's head of staff, Yasuhiro Ishikawa, stated that "large-scale personnel optimization will be implemented in China.". He stated that he will continue to transition to new energy vehicles and cope with price competition in 2024 and stated that "due to the impact of price reductions, it is difficult for fuel vehicles, including hybrid vehicles, to make profits. Before fully electrification, he will use previous profits and fuel vehicle profits to survive.". In 2024, Honda also plans to launch new electric vehicle factories in Guangzhou and Wuhan. Fifty Lan Yaxing stated that in the face of overall overcapacity, Honda will consider how to effectively utilize these new factories while optimizing personnel. He also revealed that Honda plans to accelerate the electrification process by introducing more than two electric vehicle models to the market every year.

China: Fast-Charging Future for EV Trucks



- BorgWarner, Goodman Group, Windrose Technology, and Decathlon have embarked on a collaborative venture to develop a 960kW fast-charging infrastructure for electric long-haul trucks in China, marking a significant stride towards enhancing the efficiency and sustainability of logistics operations. This partnership aims to address the increasing demand for decarbonizing supply chains, showcasing a commitment to advancing cleaner transportation solutions.

Key Highlights:

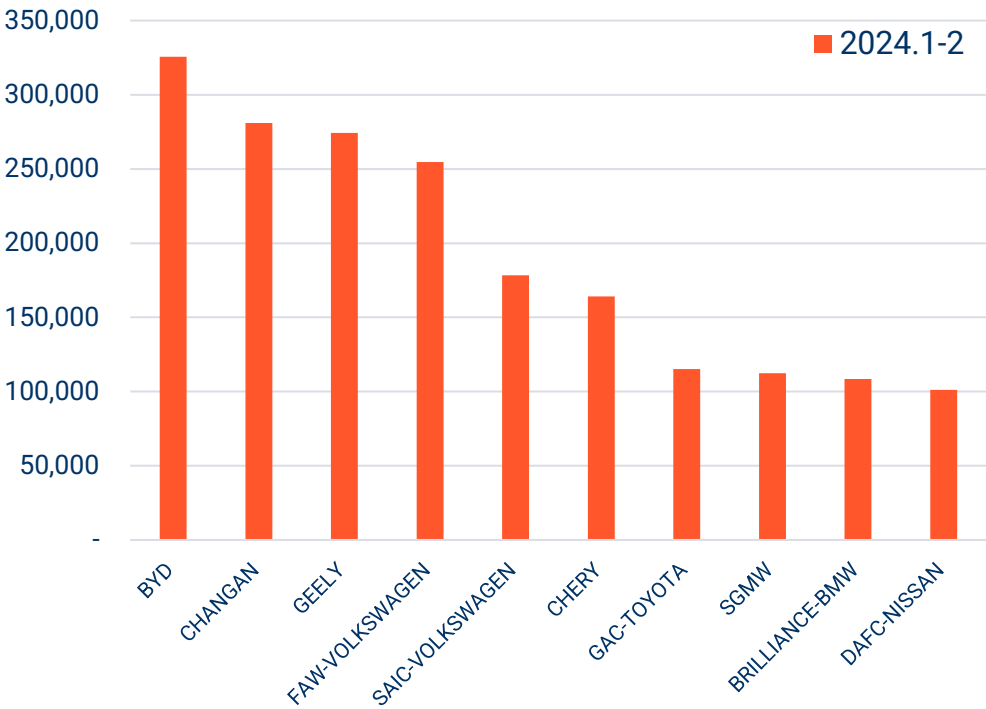
- Development of a 960kW fast-charging infrastructure for electric trucks.
- Partnership includes industry leaders BorgWarner, Goodman Group, Windrose Technology, and Decathlon.
- First project to be implemented at a Decathlon-operated warehouse in China.
- Initiative supports Decathlon's strategy for low carbon logistics.
- Windrose's new generation trucks boast a 729kWh battery with a 600 km range.
- BorgWarner's 960kW liquid-cooled charger dramatically reduces charging times.
- The collaboration leverages the strengths of each partner to create a pioneering charging solution that enables Windrose's electric trucks to regain approximately 400km of range in less than 36 minutes. This initiative is not only a leap forward in making electric long-haul transportation more viable but also plays a crucial role in Decathlon China's decarbonization efforts.

Top 10 manufacturer sales rankings in February 2024



Sales comparison

From the sales figures from January to February , BYD’s sales are ahead of other brands.

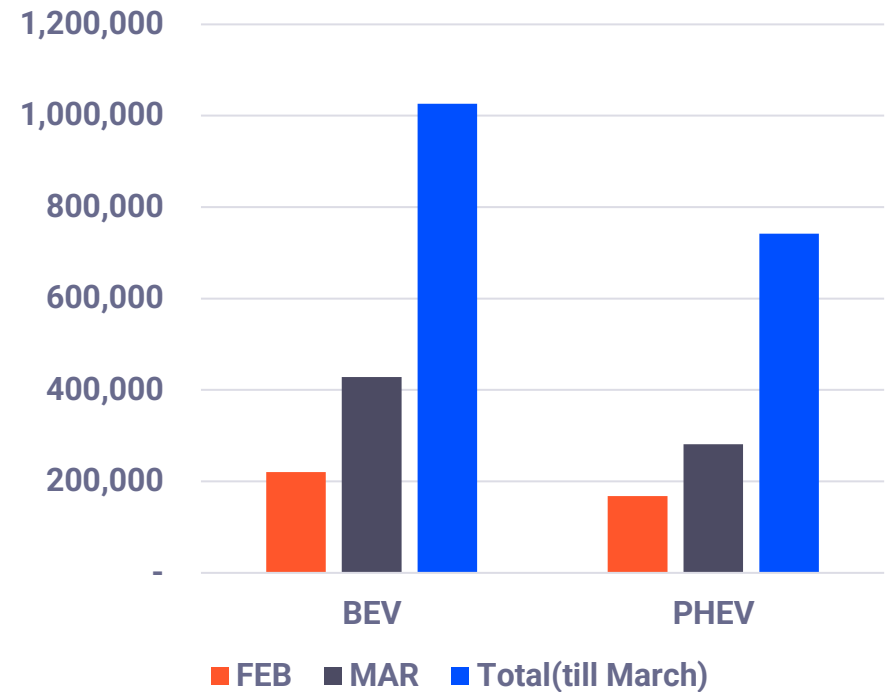


Top 10 NEV Manufacturer sales rankings in March 2024



Accumulated sales

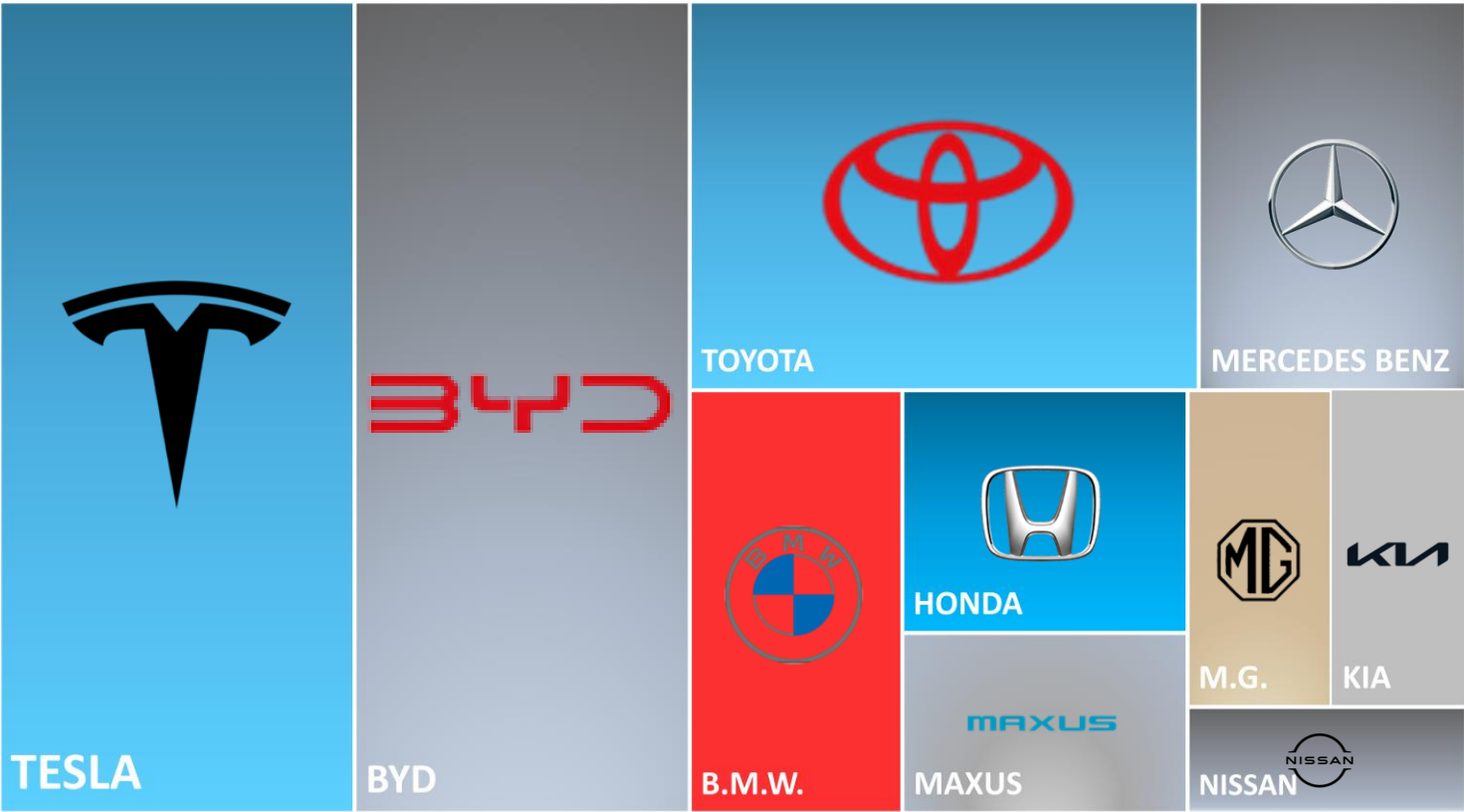
Compared to February, NEV sales in March have increased. From the cumulative sales volume from January to March, the overall sales volume of BEV is far higher than that of PHEV.



Hong Kong Highlight Vehicle News

Hong Kong January 2024 Vehicle News

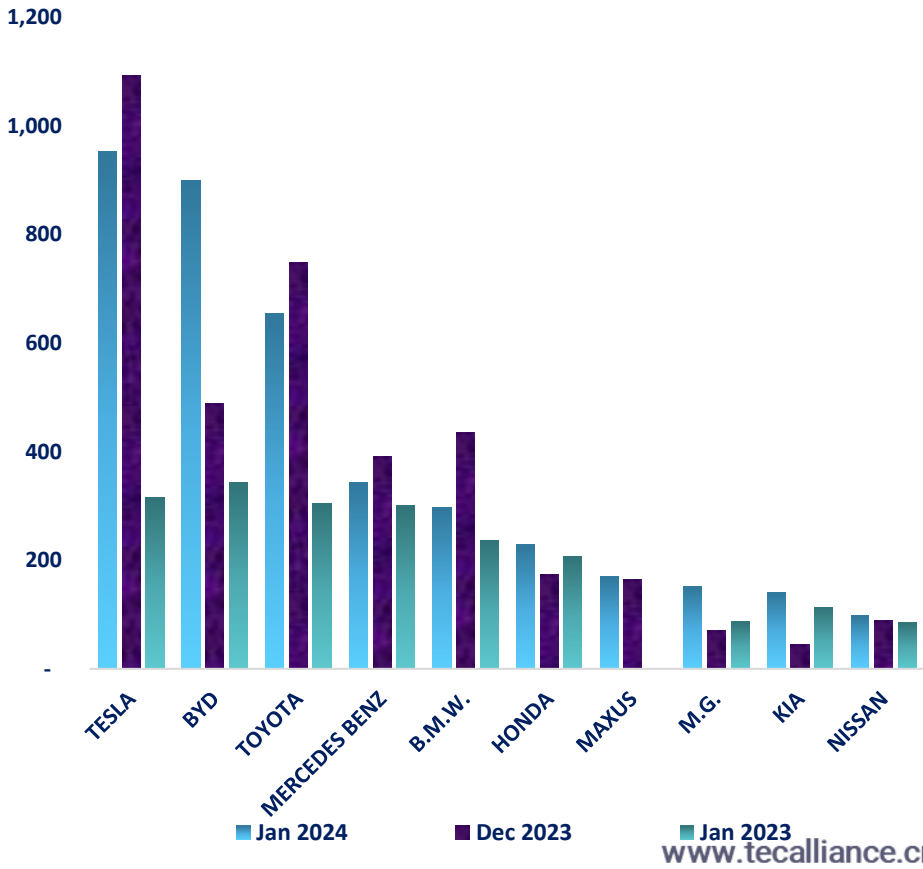
Hong Kong passenger car sales were 4,404 units in January 2024 and 4,366 units in December 2023, up 0.9% month-on-month. TESLA sold 953 units, down 12.8% month-on-month, and continued to be the most popular car brand in Hong Kong. BYD came in second with 900 units sold, up 84% month-on-month. Toyota fell 12.6% month-on-month to third place. Mercedes-Benz sales fell 12.2% month-on-month, ranking fourth. BMW came in fifth with 297 units sold, down 31.9% month-on-month. The monthly sales of the remaining top 10 brands all showed varying degrees of growth. Overall, the sales volume of the entire automobile market showed a stable trend.



Hong Kong Sales Comparison

The overall trend of total vehicle sales is stable

In January, TESLA continued to be the most popular automaker in Hong Kong. BYD's sales volume increased month-on-month, ranking second. Toyota's sales fell month-on-month, ranking third. Mercedes-Benz sales showed a downward trend, ranking fourth. BMW's sales fell month-on-month, ranking fifth. Finally, Honda, MAXUS, M.G., Kia, and Nissan are in the bottom five.



Taiwan Highlight Vehicle News

Taiwan Auto Sales Report for March 2024

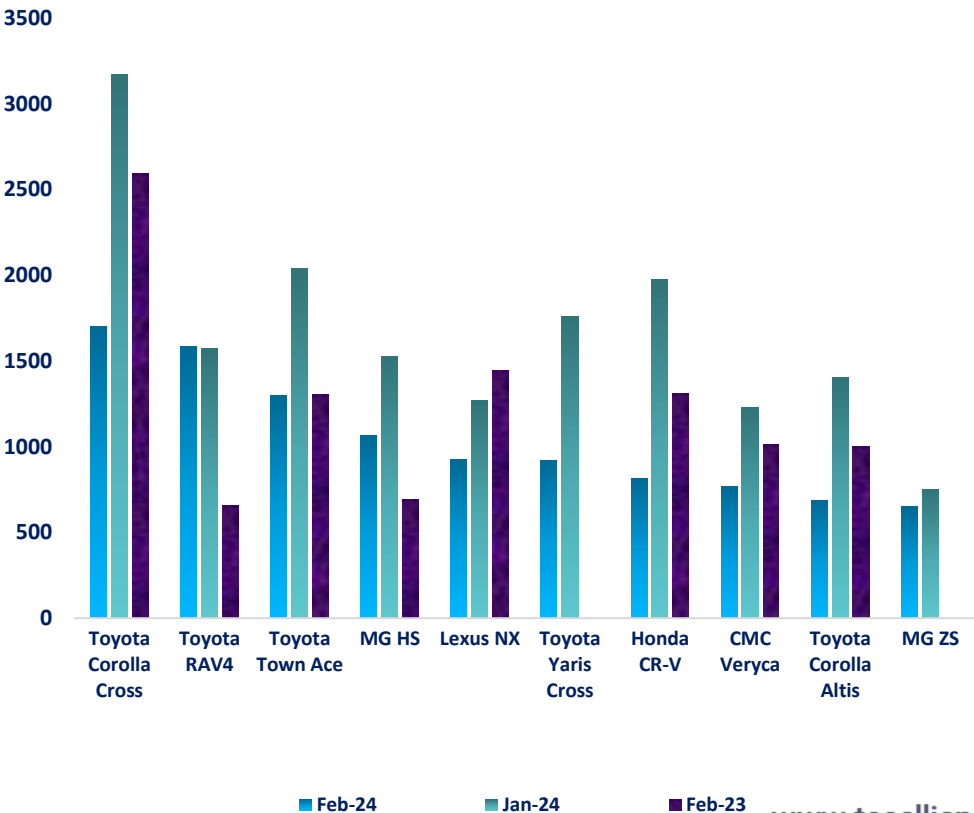


In February 2024, only 26,267 vehicles were licensed, a significant decrease of 41.4% compared to January, and a decline of 2% compared to the same period in February 2023. However, despite the decline in the total market sales in February, there are still significant differences in the performance of individual brands, including the ranking composition of the total market ranking and the sales map of brands, which also showed significant changes in February, showing different brand trends.

Taiwan Sale Comparison

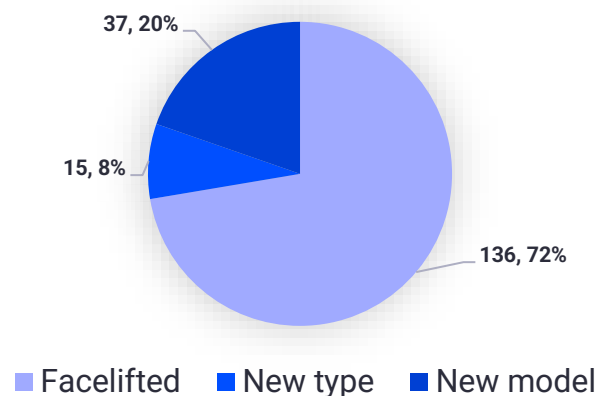
Overall market sales declined in February

The top 10 automakers in the total market saw a sharp decline in sales compared to January. The February sales champion continued to be won by Taiwanese supernova Toyota Corolla Cross with 1,704 units. Toyota's RAV4 came in second with 1,586 units, up 0.6% month-on-month. Toyota's Town Ace came in third place with 1,300 units, down 36.2% m/m and 0.4% y/y. The MG HS was in fourth place with 1,065 units. The Lexus NX was in fifth place with 928 units sold, and the Toyota Yaris Cross was sixth with 921 units sold. Finally, the Honda CR-V, CMC Veryca, Toyota Corolla Altis, MG ZS ranked seventh, eighth, ninth and tenth with 814, 767, 689 and 650 units, respectively.

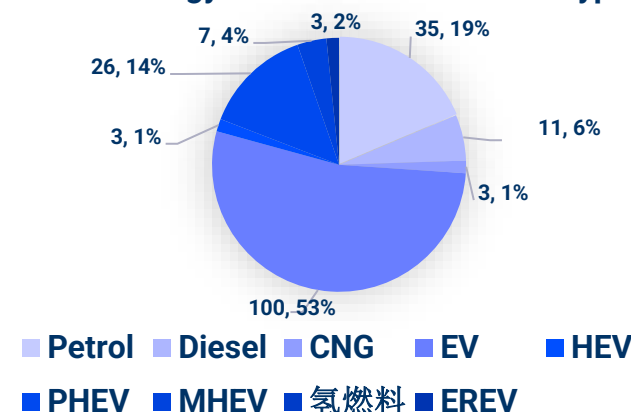


China JAN-FEB New Vehicle Analysis

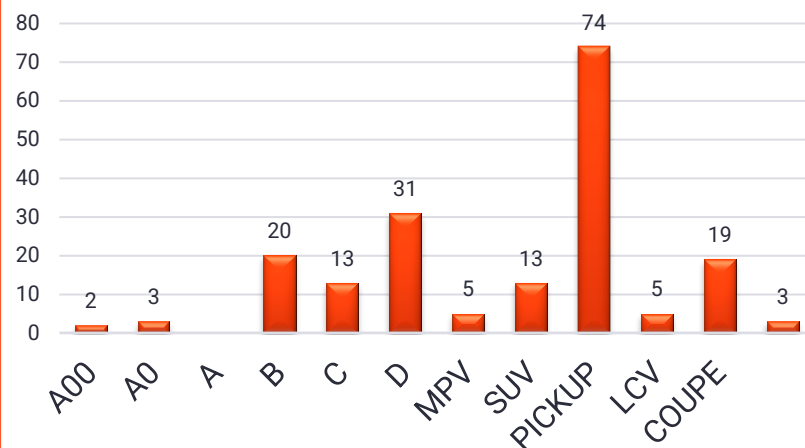
New vehicle statistics in KType



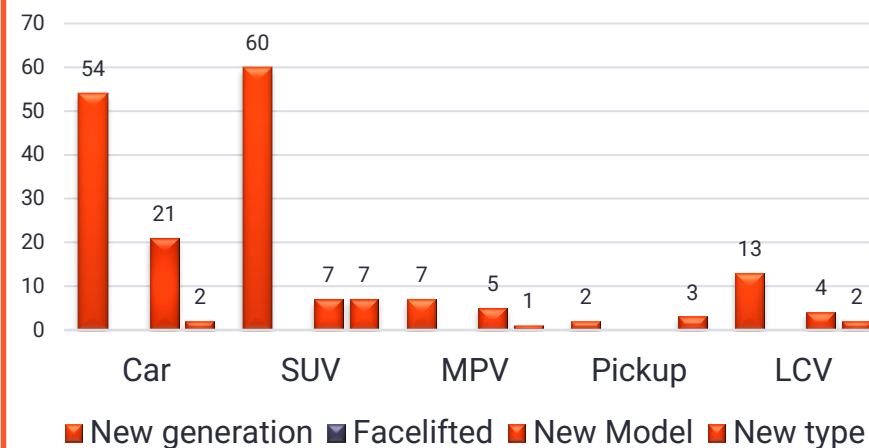
New Energy Vehicles Statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

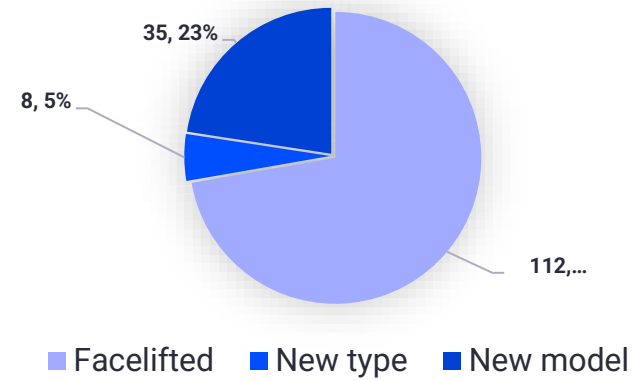
All statistical data is based on K-Type. From **January to February 2024**, the total coverage of **K-Type** was **188**, of which **52** were **New K-Type**.

New model means that launched model that did not exist before

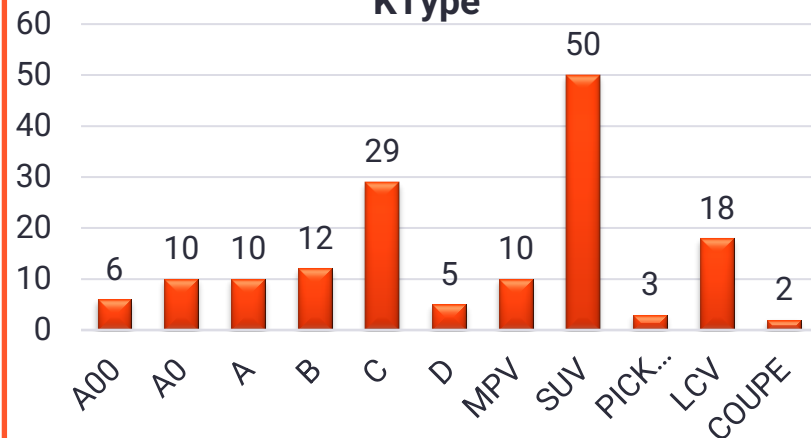
New type means that the new displacement and power have been launched

China JAN-Mar NEV Vehicle Analysis

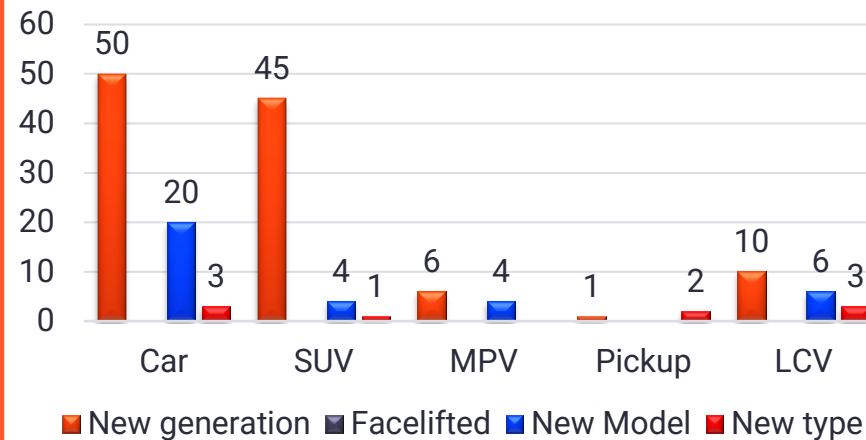
New vehicle statistics in KType



New Vehicle Segment statistics in KType



Market segment type statistics in KType



Remarks:

All statistical data is based on K-Type. January to March 2024, the total coverage of **NEV K-Type** was **155**, of which **43 were New K-Type**. Until March 2024, **EV KType** currently has **1134**.

New model means that launched model that did not exist before. New type means that the new displacement and power have been launched.

New Vehicle Statistics

#	Brand	Total
1	BYD	20
2	JAC	11
3	MERCEDES-BENZ	6
4	ARCFOX	6
5	NIO	6
6	VW (SVW)	5
7	ZEEKR	5
8	CHANGAN	5
9	HONDA (GAC)	5
10	BMW	5
11	DEEPAL	4
12	CHANA	4
13	VW (FAW)	4
14	GEELY	4
15	MAXUS	4
16	NETA (HOZON)	4
17	GAC	4
18	YUANHANG	3
19	GAC NE	3
20	BUICK (SGM)	3
21	BMW (BRILLIANCE)	3

#	Brand	Total
22	LOTUS	3
23	ert	3
24	LEXUS	3
25	FENGXING	3
26	SRM (BRILLIANCE)	3
27	TESLA	3
28	JAGUAR (CHERY)	3
29	GALAXY	2
30	FARIZON AUTO	2
31	KIA (DYK)	2
32	CHERY	2
33	IM MOTORS	2
34	MERCEDES-BENZ	2
	(BBDC)	
35	TOYOTA (FAW)	2
36	JAC EV	2
37	SMART	2
38	JMC	2
39	EXEED (CHERY)	2
40	AVATR	2
41	GEOMETRY	2
42	REFINE	2

#	Brand	Total
43	XIAOPENG	2
44	LIVAN AUTO	2
45	AEOLUS	2
46	JETOUR	2
47	LYNK & CO	1
48	MG (SAIC)	1
49	LINCOLN	1
50	EV HOUSE	1
51	NISSAN	1
	(ZHENGZHOU)	
52	SKYWORTH	1
53	LINGBOX	1
54	FORD USA	1
55	NAMMI	1
56	LINXYS	1
57	AUDI	1
58	TANK	1
59	FORLAND	1
60	YANGWANG	1
61	HYPER	1
62	KING LONG	1
63	NISSAN (DFAC)	1

Remarks:

All statistical data is based on K-Type. From **January to February 2024**, the total coverage of **K-Type** was **188**, of which **52** were **New K-Type**.

New Energy Vehicles Statistics

#	Brand	Total
1	BYD	17
2	LEAPMOTOR	7
3	ARCFOX	6
4	NIO	6
5	VW (SVW)	5
6	ZEEKR	5
7	JAC EV	5
8	HONGQI	5
9	CHANA	5
10	GAC NE	4
11	JAC	4
12	AVATR	4
13	еп	3
14	GEOMETRY	3
15	SKYWORTH	3
16	BUICK (SGM)	3
17	NETA (HOZON)	3
18	XPENG	3
19	JMC	3
20	TESLA	3
21	LOTUS	3
22	YUANHANG	3
23	i CAR	2
24	SMART	2
	SRM	
25	(BRILLIANCE)	2
26	MAXUS	2
27	NAMMI	2
28	FENGXING	2

#	Brand	Total
29	TOYOTA (FAW)	2
30	WULING (SGMW)	2
31	GALAXY	2
32	MERCEDES-BENZ (BBDC)	2
33	XIAOMI	2
34	IM MOTORS	2
35	RCEV	2
36	LIVAN AUTO	2
37	DENZA	2
38	FARIZON AUTO	2
39	QIYUAN	2
40	DEEPAL	2
41	DONGFENG (DFAC)	1
42	YANGWANG	1
43	LINGBOX	1
44	GEELY	1
45	MG (SAIC)	1
46	BMW (BRILLIANCE)	1
47	BMW	1
48	VOYAH	1
49	FORLAND	1
50	HYPER	1
51	EXEED (CHERY)	1
52	LIXIANG	1
53	EV HOUSE	1
54	LINXYS	1
55	KIA (DYK)	1
56	CHANGAN	1

Remarks:

All statistical data is based on K-Type. **January to March 2024**, the total coverage of **NEV K-Type** was **155**, of which **43** were New K-Type.

China VIO Report

CHINA VIO REPORT

VIO until 2023H1

China Mainland



VEHICLES IN OPERATION	VIO WITH KTYPE	KTYPE WITH VIO	VEHICLE BRANDS
291,987,409	291,968,189	9231	320

K-TYPE / VIO COVERAGE BY SEGMENT

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

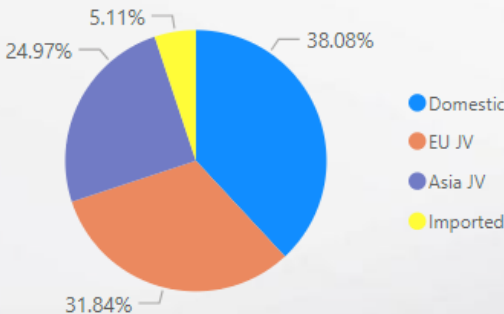
EU JOINT VENTURE CAR

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



Coverage
99.92%
Domestic

111.1M
VIO COVERED



Coverage
99.93%
EU JV

92.9M
VIO COVERED



Coverage
99.95%
Asia JV

72.9M
VIO COVERED



Coverage
99.53%
Imported

14.9M
VIO COVERED

TOP1 VEHICLE BASED ON VIO



VW (SVW)



LAVIDA

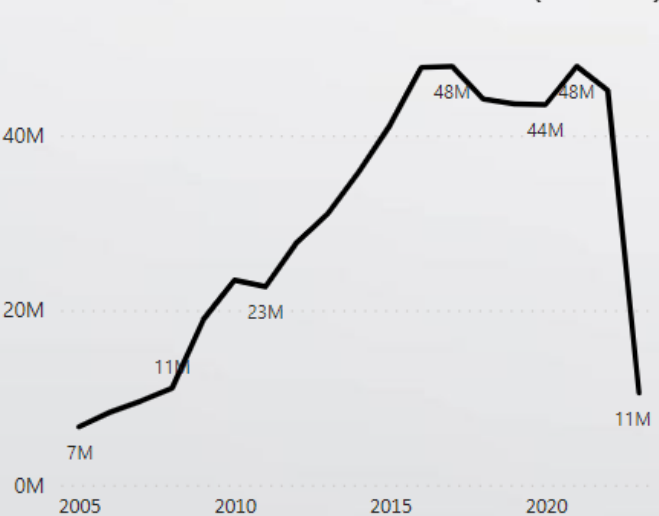
VIO OF TOP 1 VEHICLE

1,842,868

POPULATION SHARE

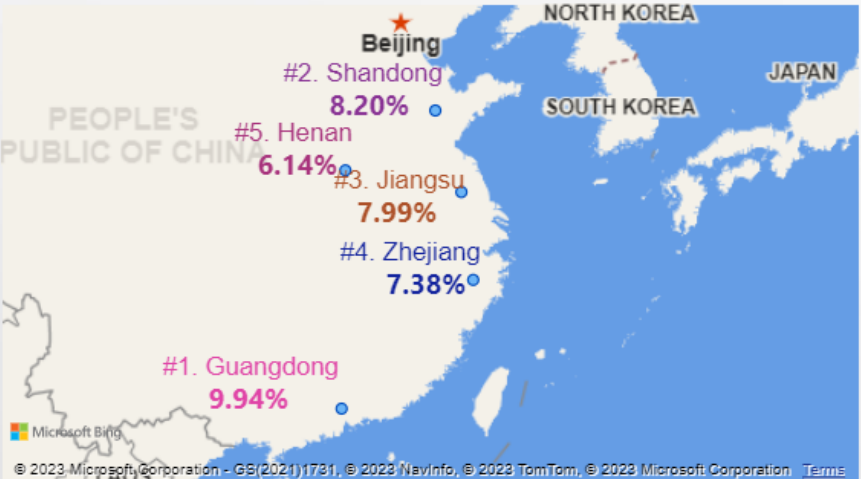
0.65%

TREND OF REGISTRATION FROM 2005 TO 202H1(Overall PC)



TOP 5 PROVINCES BY VIO (Overall PC)

(Dated from 1999 to 2023H1)



02

TecAlliance Data

OES Data Overview

RMI Data Overview



PV OE Data Research Dashboard

K-Types Researched | YTD 2024

8751

OE Num Researched | YTD 2024

345427

Generic Articles Brands Researched | YTD 2024

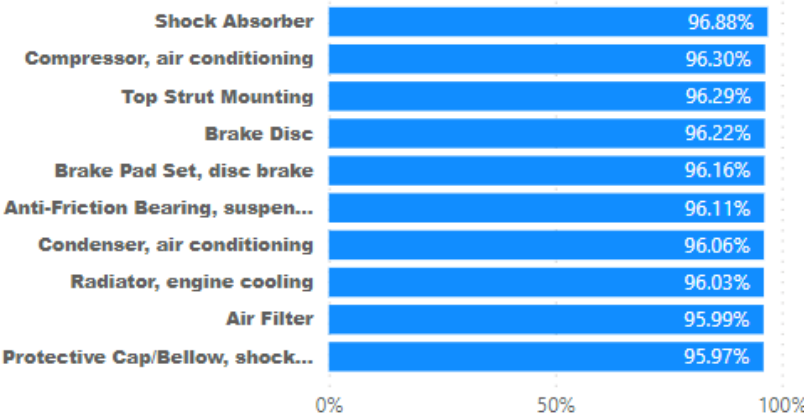
225

Vehicle Brands Covered | YTD 2024

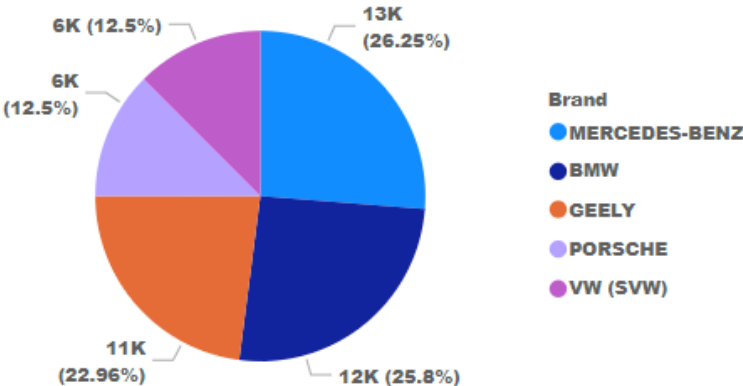
215



Top 10 Generic Articles by Coverage



Top 5 Vehicle Brands by Total Number OE



CHINA

2024

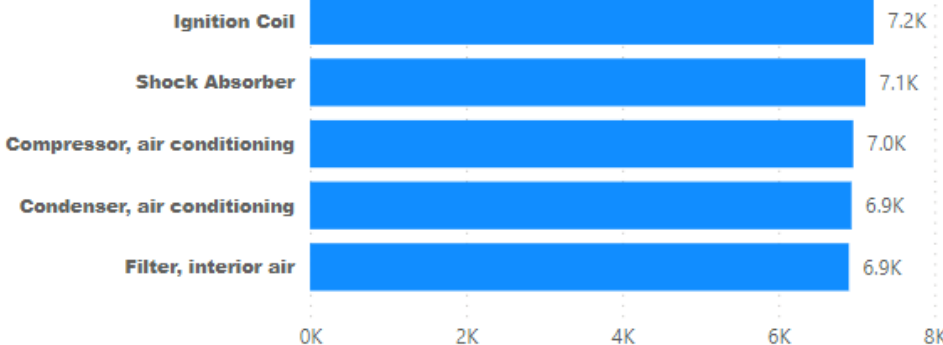
March

Total numbers of OE for Geely

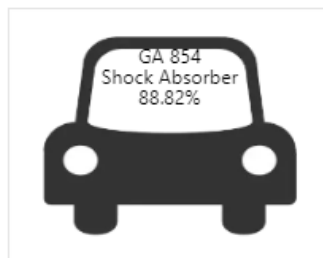
11K



Top 5 Generic Articles by K-Types



OE Coverage by VIO



NUMBER of GA for
NEV

10

NUMBER of GA for
NEV & ICE

63

Mar-2024 Update

Based on 2022H2

NEV SEGMENT GA by VIO COVERAGE

GA ID	GA Description	Coverage
854	Shock Absorber	88.82%
273	Track Control Arm	88.22%
286	Steering Gear	88.21%
447	Compressors	86.79%
298	Wiper Blade	86.26%
424	Interior air Filter	86.14%
402	Pad (disc brake)	82.16%
654	Wheel Bearing Kit	81.17%
448	Condenser	81.09%
82	Disc	80.81%
1	Starter Battery	78.73%
78	Caliper cylinder (housing)	77.83%
83	Brake hose	77.25%
793	Electric Motor Blower	76.76%
508	Radiator Fan Complete	76.46%
412	Sensor, wheel speed	75.87%
3229	Link,(Rod/Strut) stabilizer	74.61%
471	Evaporators	67.08%
1561	Regulator>window	66.68%

NEV SEGMENT GA by VIO COVERAGE

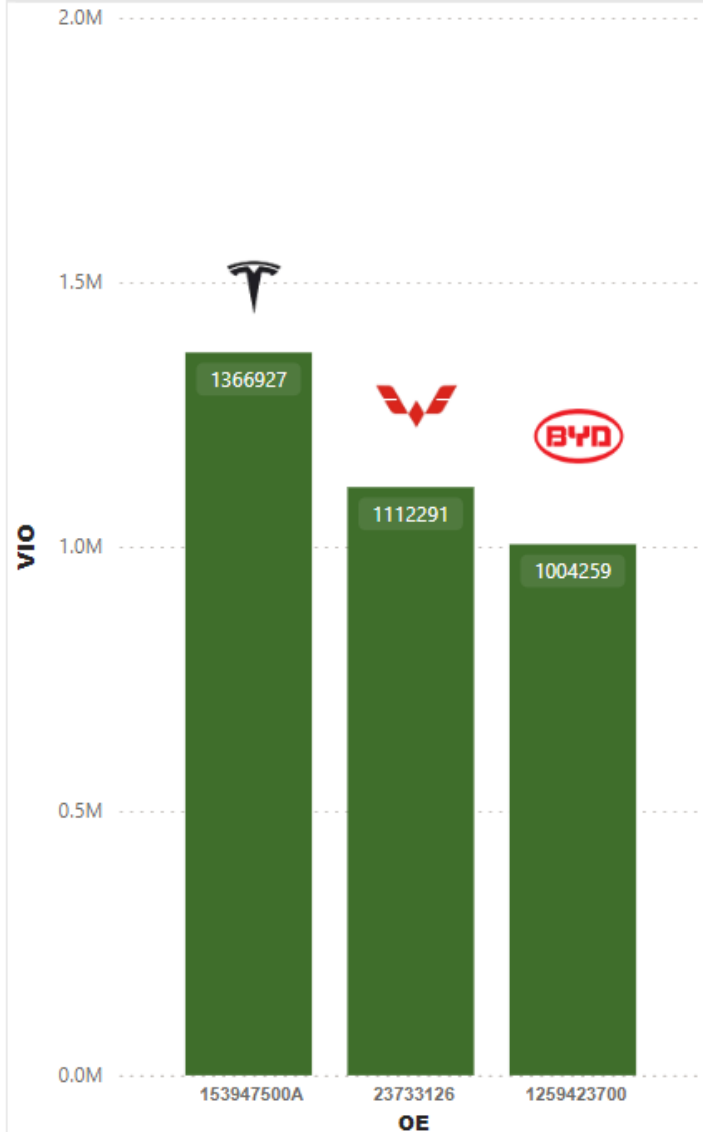
GA ID	GA Description	Coverage
1211	Steering Column	66.45%
467	Heat Exchanger, interior heating	65.61%
219	Gas spring boot-/cargo area	64.81%
1180	Suspension Strut Support Mounting	64.47%
1351	Additional Water Pump	64.31%
5031	Radiator, Drive Battery	60.85%
1182	Rubber Buffer, suspension	57.85%
3365	Cover/Rubber Boot, shock absorber	56.81%
247	Mounting, engine	55.99%
397	Expansion Tank, coolant	54.80%
1626	Friction Bearing	53.99%
183	Expansion Valve, air conditioning	53.96%
914	Tie Rod End	53.67%
2232	Wheel Sensor,tyre pressure control system	51.06%
13	Drive Shaft	47.75%
258	Brake Master Cylinder	40.17%
200	Electro Motor, window regulator	38.09%
331	Bushing, stabilizer	31.99%

NEV SEGMENT GA by VIO COVERAGE

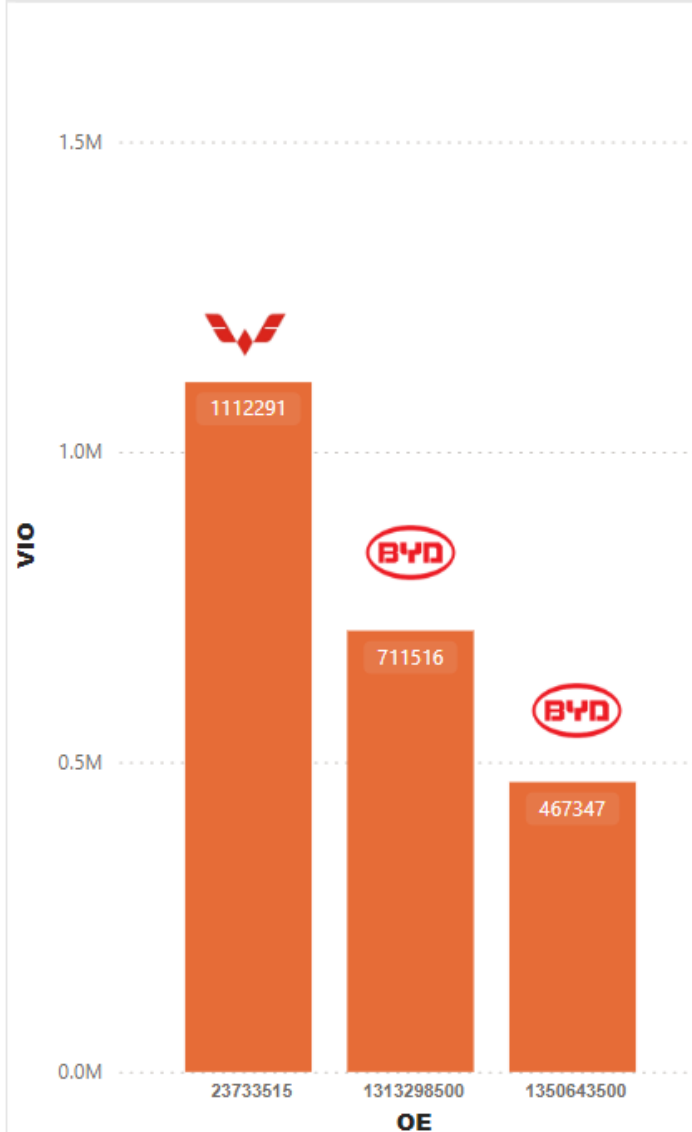
GA ID	GA Description	Coverage
2462	Ball Joint,(Support-/Controlarm Link)	30.75%
51	Axial Joint (steering)	29.85%
5314	Screw Set, brake disc	28.57%
514	Gas spring engine flap	24.21%
191	Bellows (steering)	23.91%
301	Wiper Arm,windscreen washer	22.28%
123	Drum	21.86%
70	Shoe (drum brake)	20.70%
251	Control Arm-/Trailing Arm Bush	20.32%
655	Wheel Bearing	19.77%
851	Receiver Driers	19.34%
124	Primary handbrake cable	18.89%
919	Dust Cover Kit, shock absorber	15.41%
299	Wiper Blade Rubber	11.81%
2323	Radiator Fan Shroud	10.86%
300	Wiper Linkage	10.27%
195	Bellow Kit (steering)	8.48%
8558	Battery Pack/48 V Battery	6.08%

Top 3 Coverage of OE by VIO

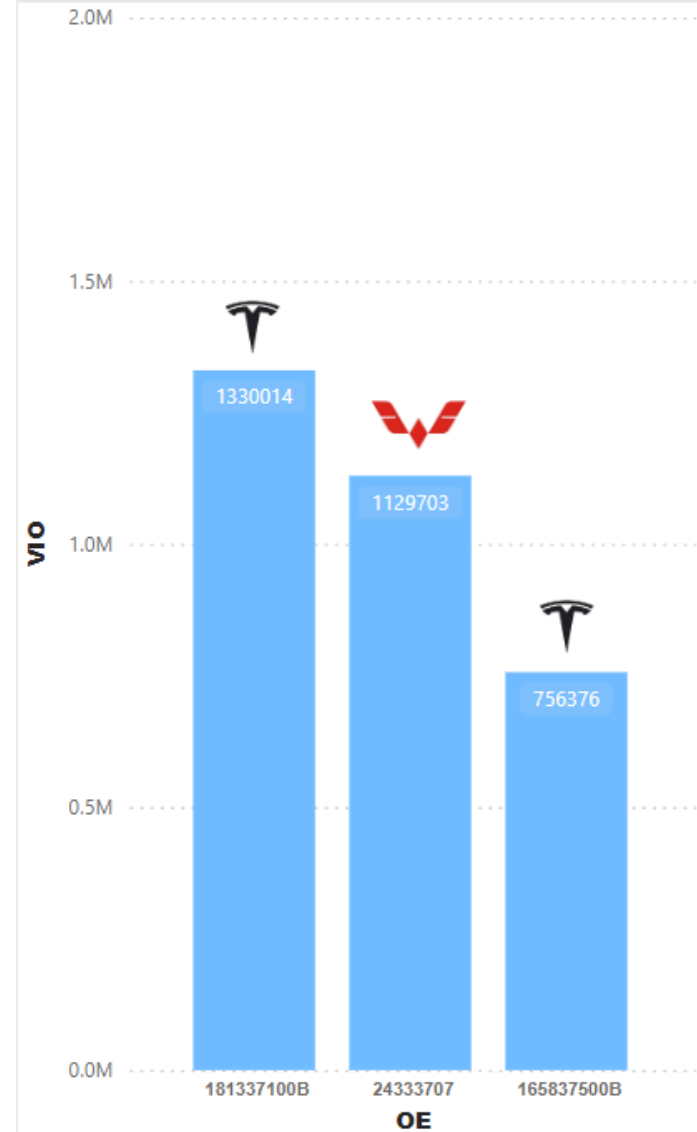
GA 793 Electric Motor Blower



GA 471 Evaporators



GA 424 Cabin Air Filter



PADS NEV Dashboard

K-TYPEs Researched
YTD 2023

583

OE NOs Researched
YTD 2023

19,491

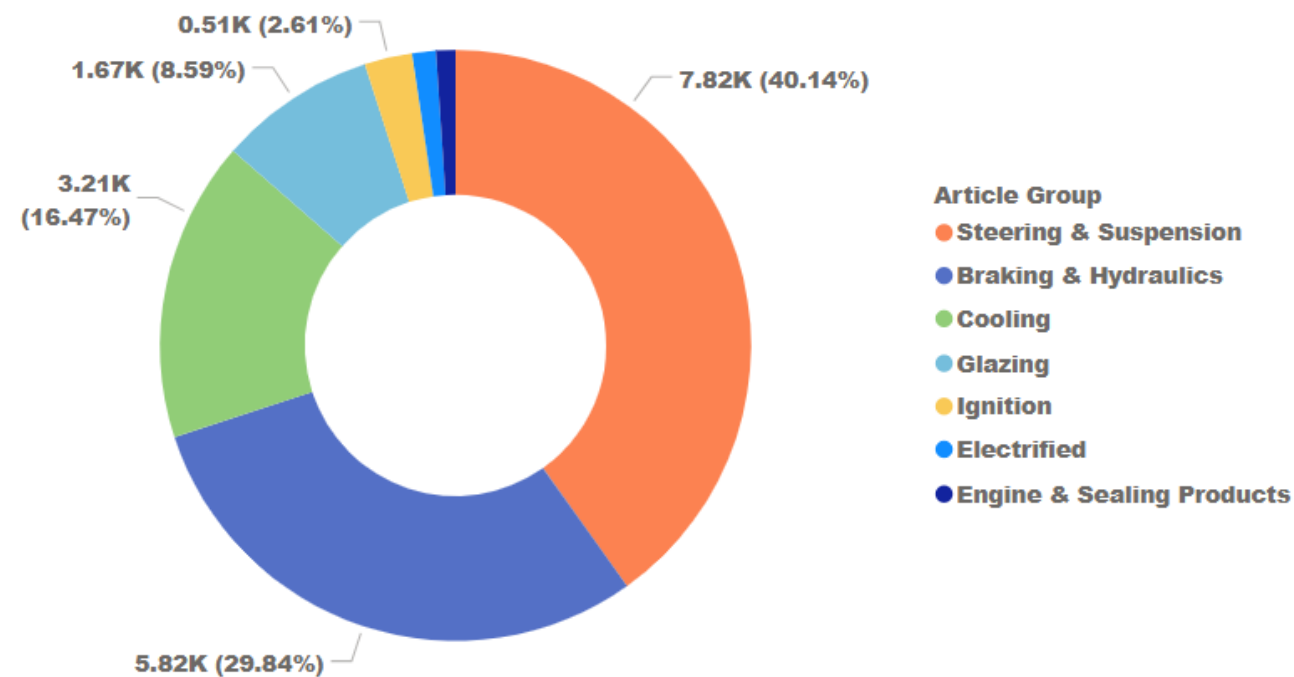
GA Researched YTD
2023

101

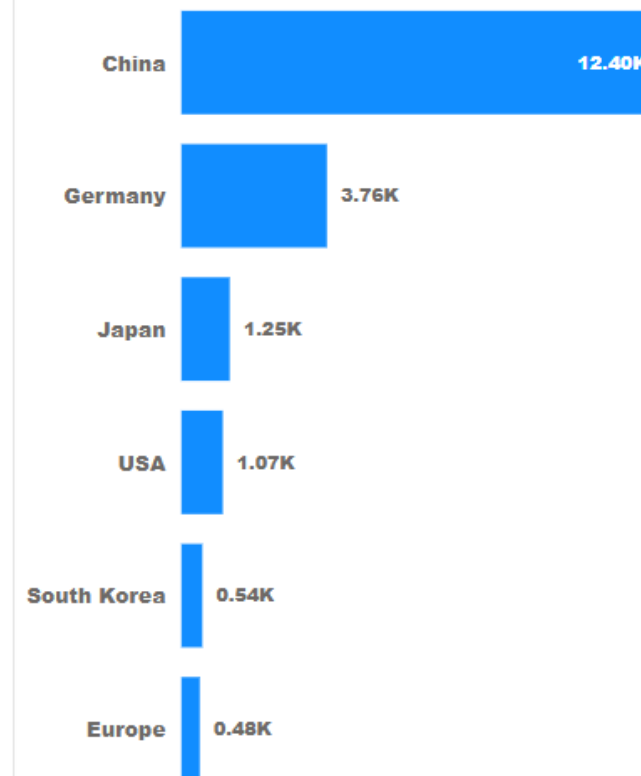
Vehicle Brands Covered
YTD 2023

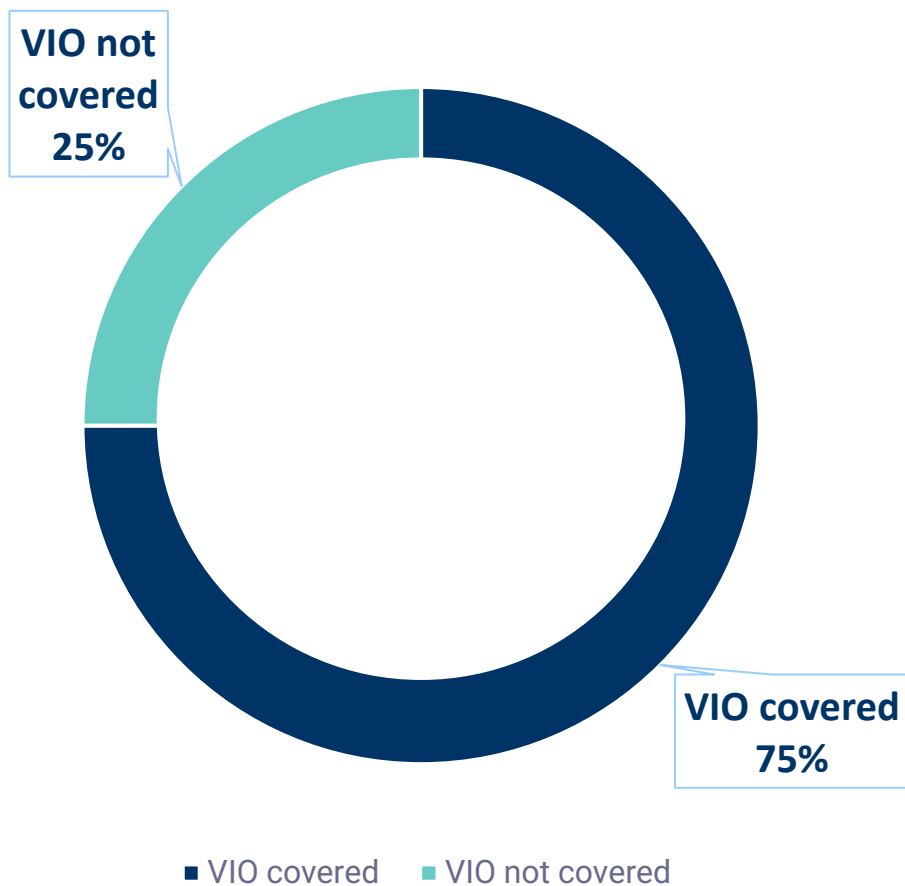
103

Total Group by Number of OE



Total Brand Series by Number of OE

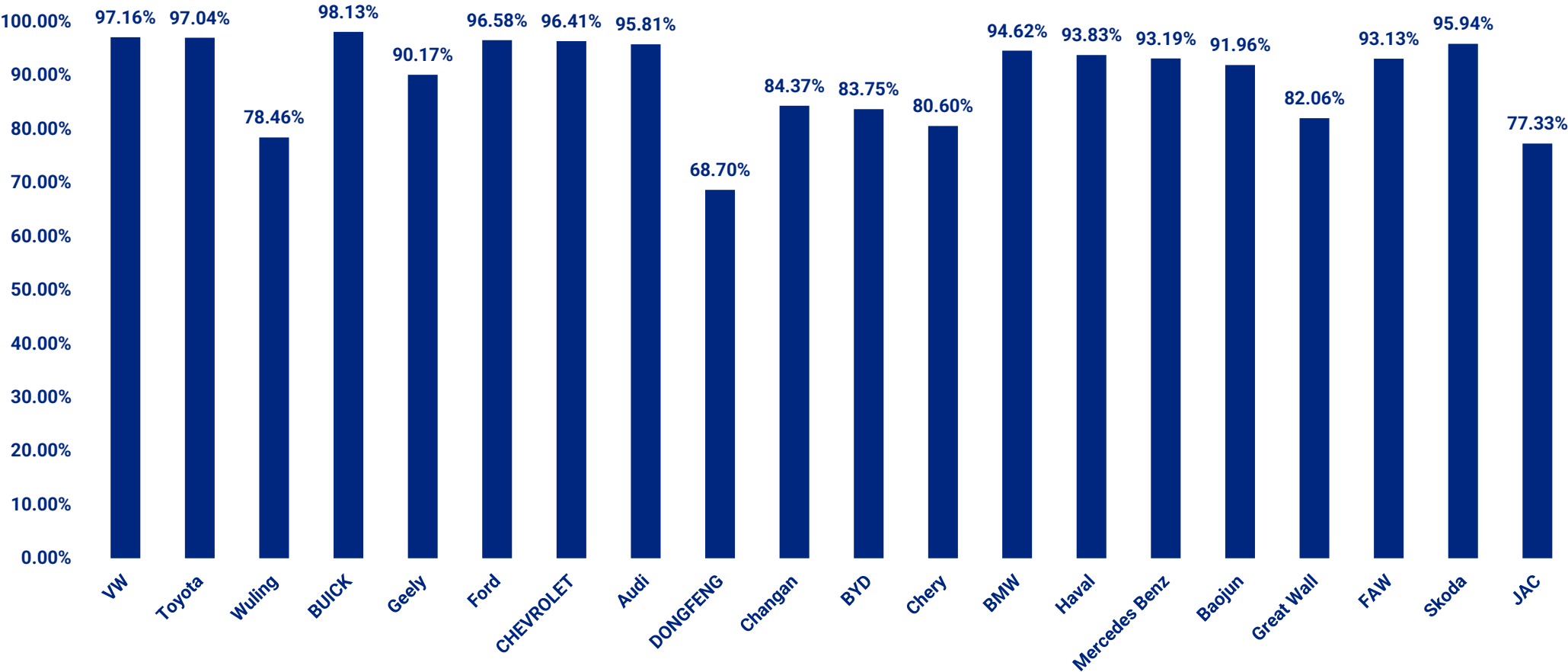




75%
219M Vehicles
of 292M VIO
Completed

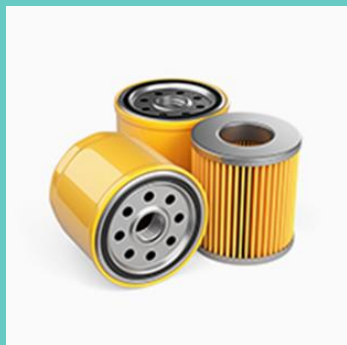
Top 20 Vehicle Brand Based on China VIO

Coverage of Maintenance Information



TecRMI Maintenance Data Overview

Oil & Fluid Specification/ Filling Quantity



Engine Oil
~95% of VIO



Gearbox Oil
~92% of VIO



Brake Fluid
~75% of VIO



Coolant
~70% of VIO



A/C Refrigerant
~60% of VIO



**Others Available
on Demand**
axle oils, steering oil etc.

Maintenance Interval

- Engine Oil and Filter ~92% of VIO
- Spark Plug ~80% of VIO
- Transmission Oil and Fluid ~88% of VIO
- Air Filter ~75% of VIO
- Interior Filter ~75% of VIO
- Fuel Filter ~75% of VIO
- Brake Fluid ~75% of VIO
- Coolant ~75% of VIO



03

Company News

- Highlights Highlights of TecAlliance China participation in 2024 Auto Parts Carnival Summit Forum
- Highlights from the 6th International Thousand Talents Conference
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Highlights of TecAlliance China participation in 2024 Auto Parts Carnival Summit Forum



On March 18, the 2nd China (Guangzhou) 2024 International Auto Parts Supply Chain Carnival with the theme of "Evolving a New Ecology and Iterative Qualitative Future" was held in Yangcheng, Guangzhou.

In recent years, "Going overseas" has also become the choice of more enterprises. Along with the gradual saturation of the domestic market, auto parts and accessories going overseas are booming, and the cross-border market welcomes potential opportunities.

At the roundtable forum, Mrs. Liu Haiying, the sales leader of TecAlliance China, as one of the invited speakers, gave her objective and professional cutting-edge views and insights on the theme of "how Chinese auto parts enterprises can achieve cross-border going overseas". "In today's globalized economy, data has become one of the most critical assets in cross-border e-commerce," she said. "The right data analysis can not only help businesses effectively manage and expand their overseas business, but also make more informed decisions when setting up warehouses and companies overseas. As a world-renowned data service provider, TecAlliance has distinct advantages in OE data, real-time data processing, easy to use return claims, and repair and maintenance data, and offers enterprises with a one-stop solution to meet the increasingly complex challenges of cross-border sales."



Highlights of the 6th International Thousand Talents Conference on New Trends in the Automotive Industry



On March 19th, the 6th International Thousand Talents Conference on New Trends in the Automotive Industry, AMR2024 Frankfurt Tianjin Exhibition Official Forum was grandly held in Tianjin Convention and Exhibition Center Marriott Hotel . As the first high-end industry forum for the national automotive aftermarket industry, the conference brought new trend interpretation, knowledge sharing and global vision to the aftermarket, and received strong support from as many as 47 domestic and overseas industry organizations, which invited leaders of industry associations and leaders of the automotive aftermarket industry from China and overseas, and other industry gurus of the automotive aftermarket on the spot.

As a VIP speaker, Mr. Zhou Qi, account manager of TecAlliance China, shared the topic of **"One-stop data service to help auto parts to go overseas".** The presentation highlighted TecAlliance globally standardized VIO database, OE parts database, branded parts database, TecDoc Global Catalog 3.0 and TecCom one-stop supply chain platform management system. And specially emphasized the **30 years anniversary of TecDoc** this year.



TecDoc global catalogue, which covering the global market over 1400 brands, 160,000 models, 8.8 million parts information; supporting parts number, OE number, VIN number, engine number, model and multiple search options; supporting product comparison and filtering, it helps parts manufacturers and traders to quickly develop local and overseas markets and enables customers to promote products to the target market and achieve the sales goals rapidly.

TecAlliance data helps enterprises to discover target markets with potential, find models that overlap between domestic and overseas markets, prepare goods for overseas warehouses according to VIO, and sell the existed domestic products to overseas markets successfully.

Highlights from the TecAlliance China “Go-to-Market” Data Supplier Conference



On April 18th, a significant event – the TecAlliance China 2024 “Go-to-Market” Data Supplier Conference took place in Shanghai. This gathering brought together industry leaders, innovators, and partners from across China to explore new horizons, analyze emerging trends, and unlock fresh business opportunities within the realm of data management solutions.

A Vision for the Future: Insights and Innovations

Key figures within TecAlliance, including Mrs. Iris Huang, Managing Director of TecAlliance China, and Mr. Matthias Moritz, Managing Director of TecAlliance Asia Pacific, graced the event with their presence. Through engaging presentations and interactive sessions, attendees gained valuable insights into the latest global data management solutions and market trends. From innovative technologies to strategic approaches, the discussions fostered a deeper understanding of the evolving landscape and equipped participants with the tools needed to navigate it successfully.

Twelve prestigious awards were presented in the grand awards ceremony of the conference, each symbolizing excellence in various aspects of data management and business development. From the Premium Data Supplier (PDS) Award to the Best International Business Development Potential Award, each accolade underscored the commitment and innovation of the recipients, setting a benchmark for excellence within the industry.

Embracing Collaboration: Strengthening Partnerships

At the heart of the conference was a spirit of collaboration and partnership. Mrs. Iris Huang emphasized the importance of open dialogue and mutual understanding in enhancing services to data suppliers and fostering long-term relationships. By bringing together TecDoc data suppliers from across the country, the event provided a platform for meaningful connections and knowledge sharing. Through collaboration and shared aspirations, TecAlliance and its partners are poised to embark on a new journey towards success.

Towards New Heights: The Road Ahead

As TecDoc celebrates its 30th anniversary, the conference marked the beginning of a new chapter for TecAlliance China. The unveiling of the 2024 go-to-market marketing communication roadmap signals a commitment to innovation, growth, and excellence. With a shared vision and unwavering determination, TecAlliance and its partners are prepared to navigate the challenges and opportunities that lie ahead. As they continue to move forward together, they are bound for new heights of success and achievement.

The TecAlliance China 2024 “Go-to-Market” Data Supplier Conference was more than just a gathering – it was a celebration of success, collaboration, and innovation. Through insightful discussions, strategic planning, and recognition of excellence, the event served as a catalyst for growth and transformation within the industry. As TecAlliance and its partners embark on a new journey, they do so with a sense of purpose and optimism, knowing that their collective efforts will lead them to new heights of success.

2024 China Marketing Communication Roadmap



“Go to market”

30
YEARS

TecDoc

- Supplier Connection Event (HT Auto), Hanoi 16-17 March
- Auto Maintenance & Repair (AMR) Tianjin, 20-23 March
- Australian Auto Aftermarket Expo Melbourne 11-13 April
- Taiwan Customer Day, Taipei: 16 April
- Go-to-Market Data Supplier Conference Shanghai 18 April
- AMPA 2024, Taipei: 17-20 April
- International Seminar on South Korea's Automotive Industry, Dangjin: 3 May
- CAPAS Chengdu: 16-18 May
- INAPA Indonesia, Jakarta: 15-17 May
- Indonesia Customer Day, Jakarta: 10 June
- Mexico Automechanika: 10-12 July
- International Auto Parts and Aftermarket Exhibition (Guangzhou) 28-30 August
- 2024 the 4th China (Wenzhou) International Auto Parts Expo, 5-7 September
- Automechanika Frankfurt, Germany 10-12 September
- AAPEX Show, Las Vegas: 5-7 November
- Automechanika Johannesburg, South Africa: 19-21 November 2024
- Automechanika Shanghai (AMS) 2- 5 December
- Automechanika Dubai: 10-12 December

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