

China Automotive Sales Report

Jan. ~ Dec. 2021

GETEC MKT

Jan. 2022

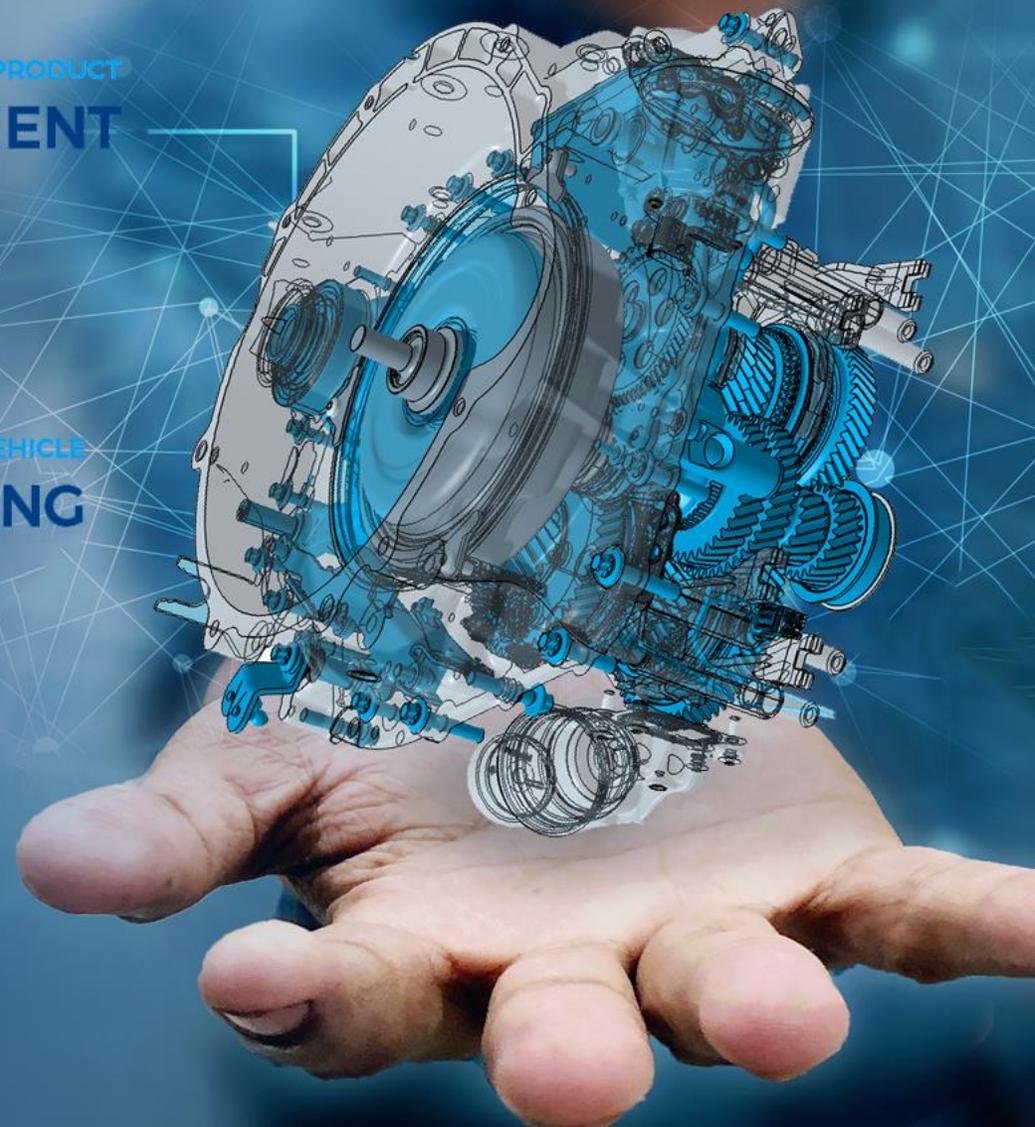
GETEC
Getriebe Technik GmbH

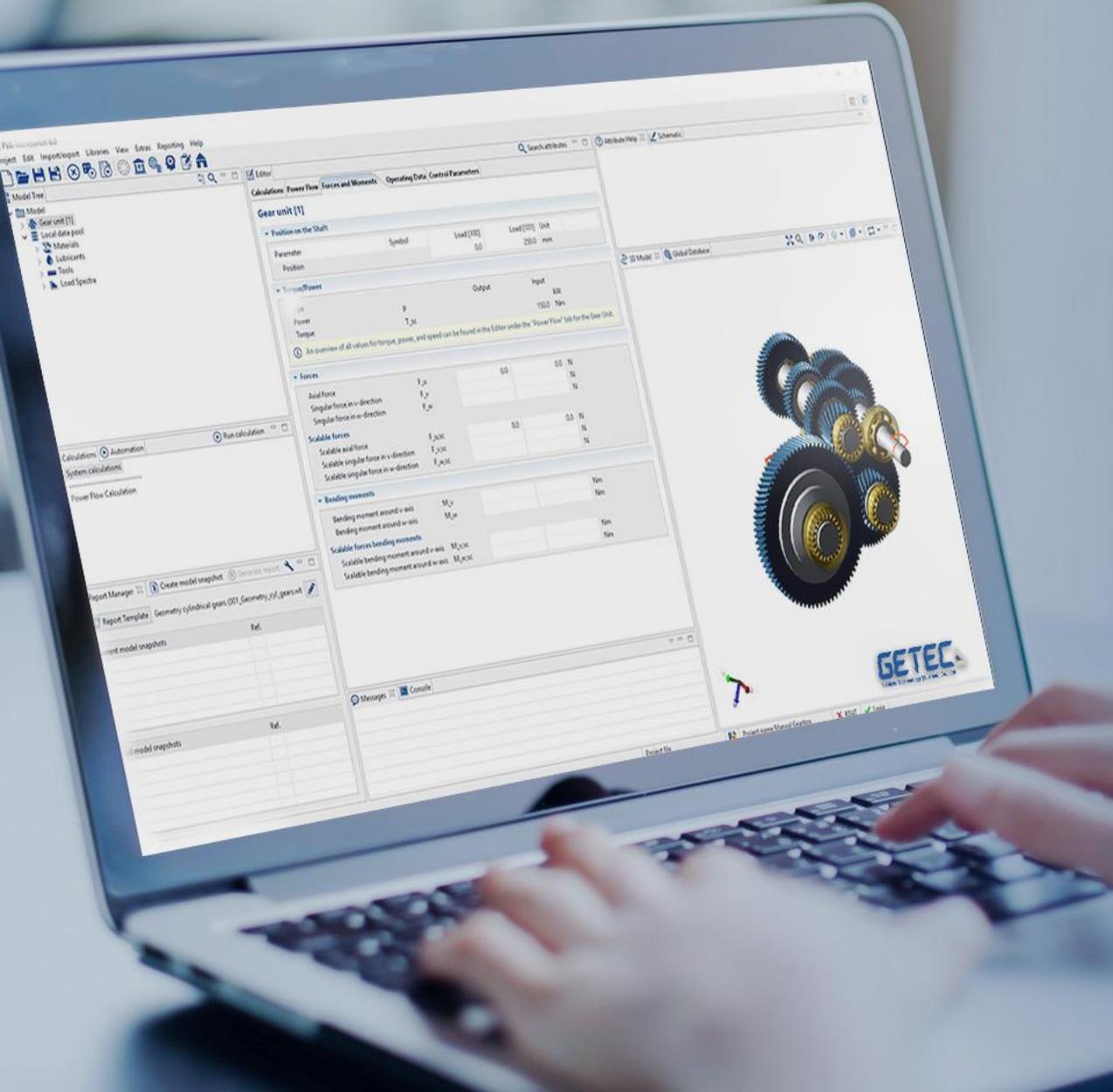
MOBILITY
INTELLIGENCE

DRIVELINE PRODUCT
DEVELOPMENT

DRIVELINE & VEHICLE
TESTING

VEHICLE ENGINEERING
SERVICE





Overview

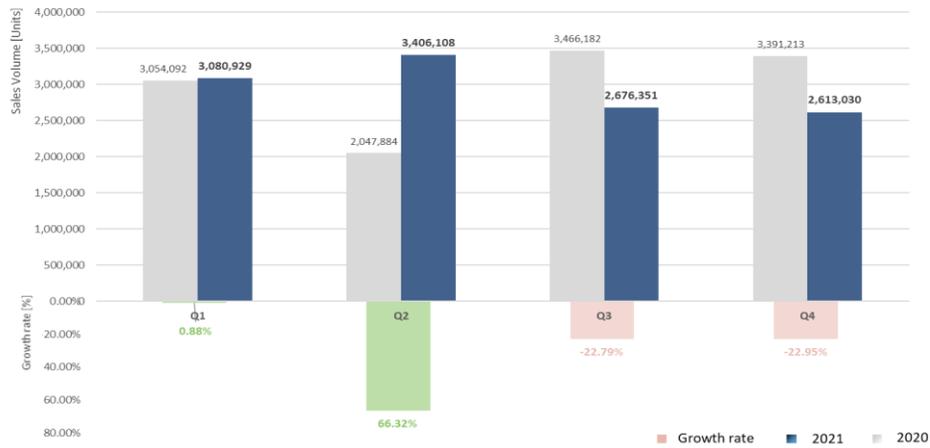
- ❑ Global Auto Sales (Quarterly)
- ❑ China Sales Overview 2021
- ❑ OEM
- ❑ Model Sales
- ❑ New Energy Vehicle
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- ❑ Commercial Vehicle Sales
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Global Auto Sales (Quarterly)

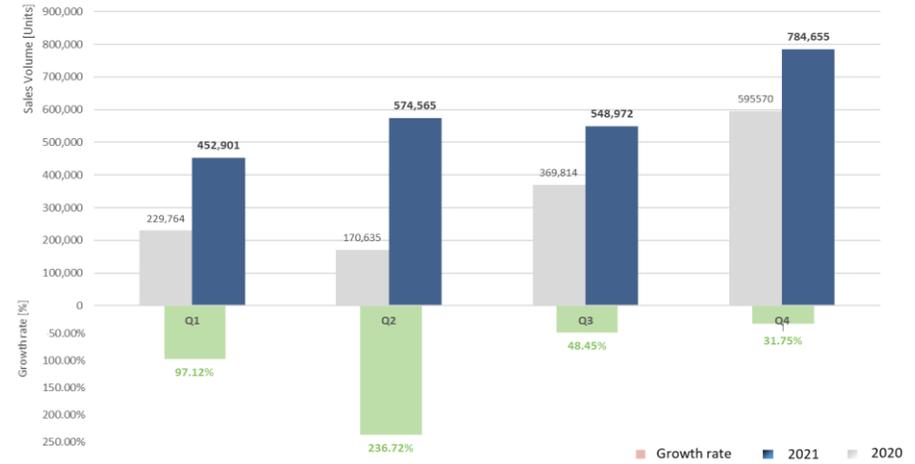


Europe & China Sales Data (Quarterly)

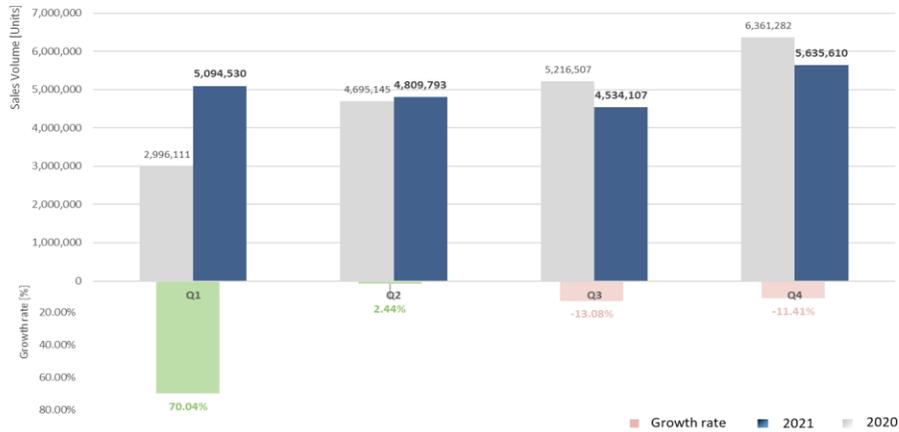
2021 Europe PV Sales (Quarterly)



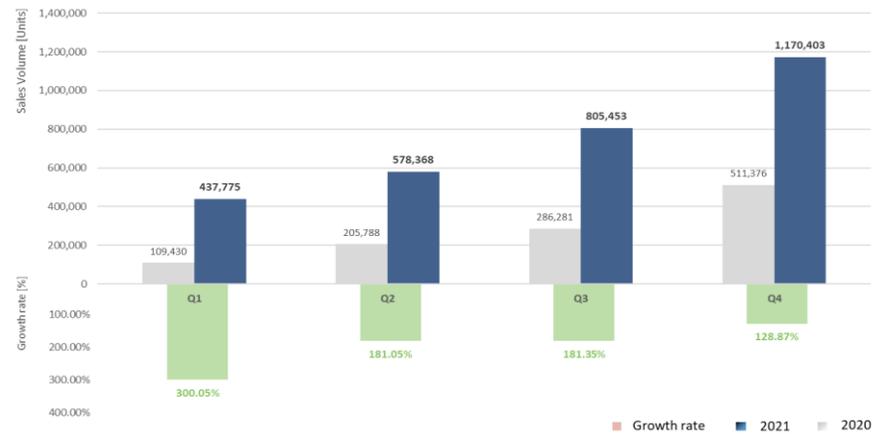
2021 Europe NEV Sales (Quarterly)



2021 China PV Sales (Quarterly)



2021 China NEV Sales (Quarterly)



China Sales Overview in December



China Sales Data

2.10
Million

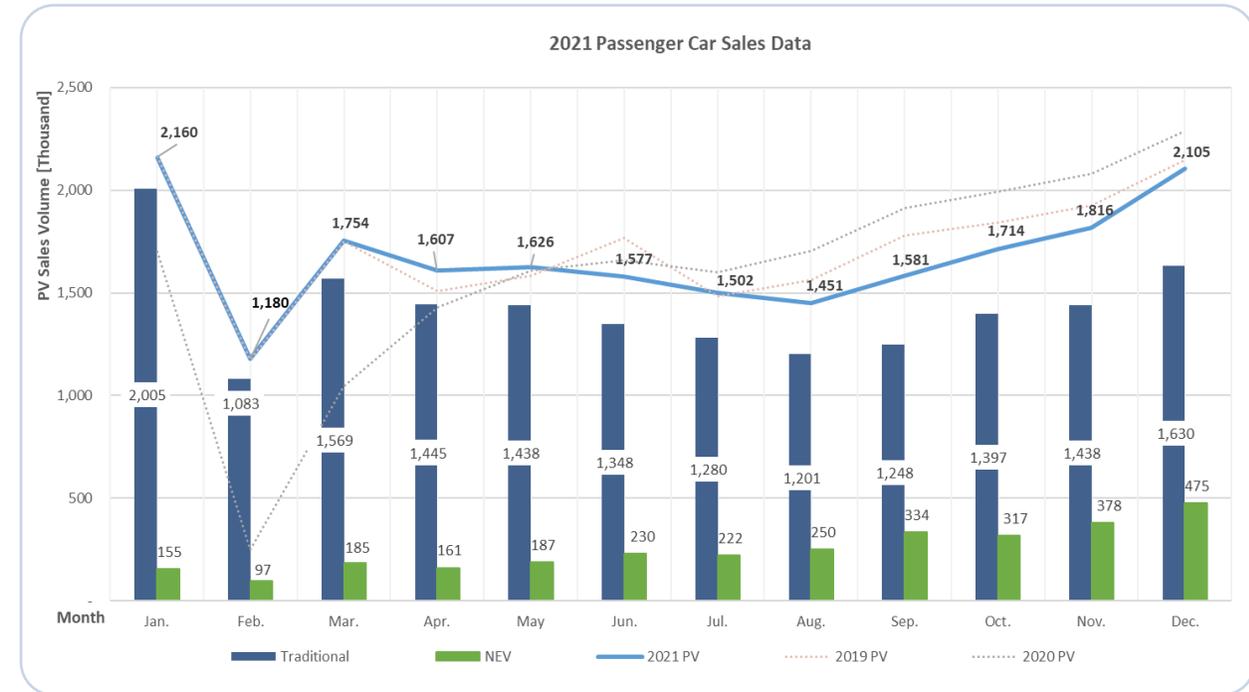
- In December, the sales volume of Chinese passenger vehicles was **2.10 million**.

7.99% ↓

- Compared with the steady increase in November, sales in December rose rapidly, increase **15.90%** month-on-month, but down **7.99%** year-on-year.

4.18% ↑

- As of December, the overall sales of Chinese passenger vehicles of 2021 are **20.07 million**, with a year-on-year increase of **4.18%**. There is no significant improvement compared to 2020.



Passenger vehicle Monthly Increase (2021 VS 2020)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
27.12%	371.10%	67.69%	12.43%	1.13%	-4.89%	-6.10%	-14.84%	-17.35%	-13.96%	-12.72%	-7.99%

	Total Jan. ~ Dec.	Compare with 2020	Growth rate
2020	19,269,045	804,995	4.18%
2021	20,074,040		

Traditional vs BEV vs PHEV

128.45% ↑

NEV (BEV+PHEV) sales were **474,887** in December, with YoY increase of **128.45%**. MoM increase **25.47%**.

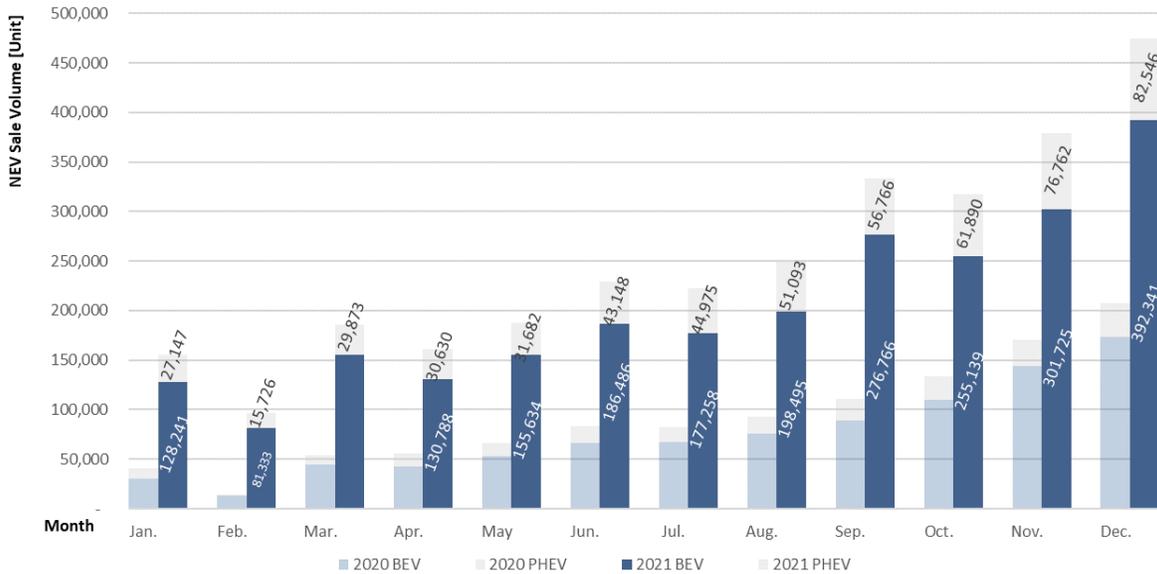
2.99 Million

By December, the total sales of NEV reached **2.99 million**. Overall sales increase **168.84%** than 2020.

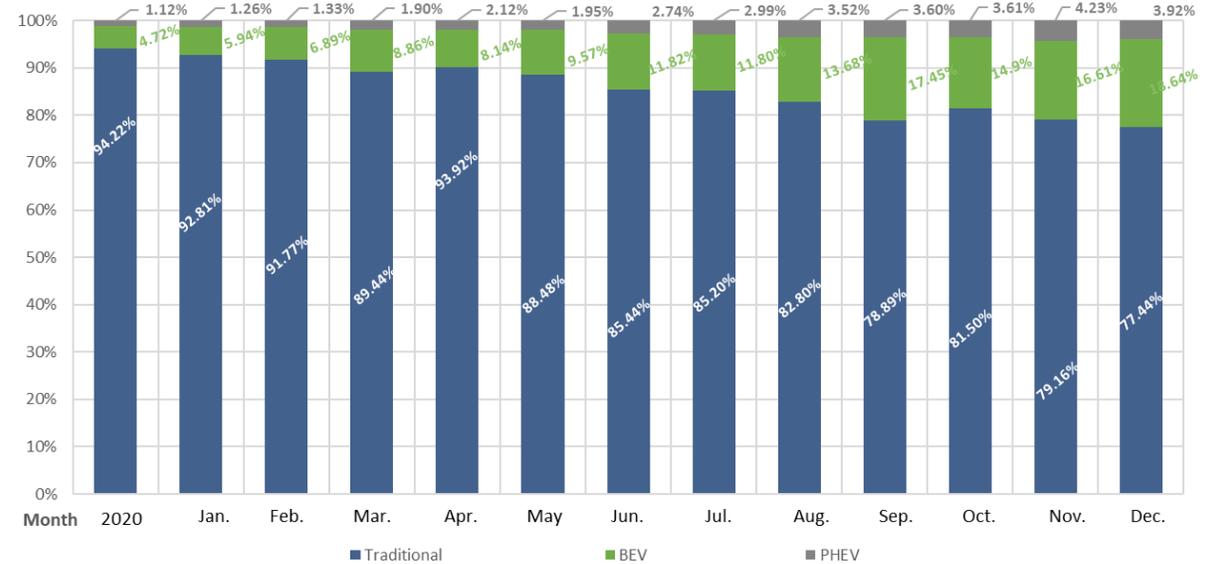
14.90%

In 2021, China's NEPV account for **14.9%**, up from **5.84%** of last year, with a breakthrough growth, of which BEVs account for **12.15%** and PHEVs account for **2.75%**.

BEV vs PHEV Sales Data



2021 Traditional vs BEV vs PHEV



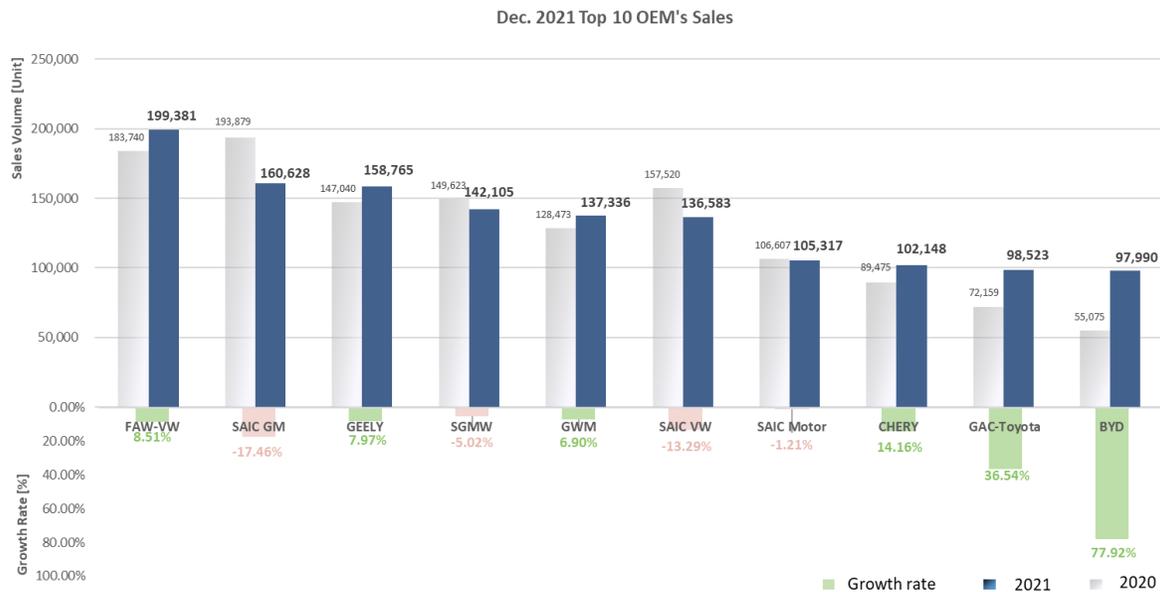
OEM



OEM

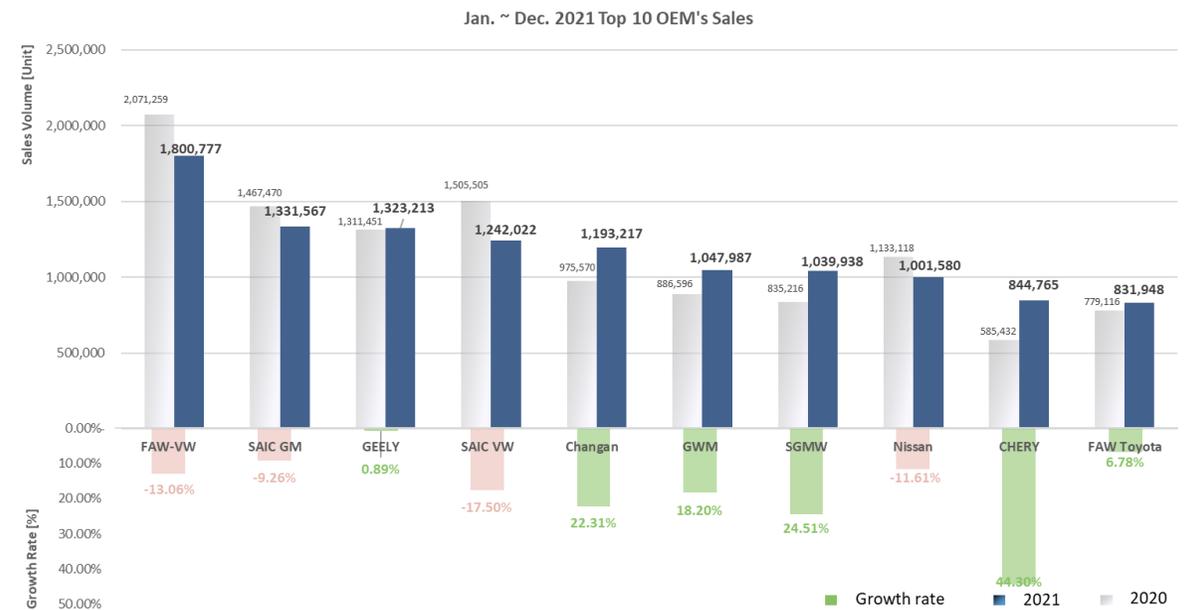
FAW-VW
SAIC-VW
BYD

- From December, the sales volume of various OEMs increased slightly compared with the same year. FAW-VW increased by **8.51%**, SAIC-VW decreased by **13.29%**, and the largest increase was still BYD, which was **77.92%** with 97,990 units.



SGMW

- From the view of the whole year of 2021, the sales volume of Chinese OEM has shown a good sales trend in the 2021, of which **Chery** has the largest growth rate of **44.30%**. The sales volume of joint ventures decreased year-on-year, among which SAIC-VW reached **17.50%**, suffered the largest decline.



Model Sales



Sedan

1.71% ↓

- Sedan sale in December was **1,048,601**, decrease **1.71%** than 2020, and increase **17.56%** on the previous month.

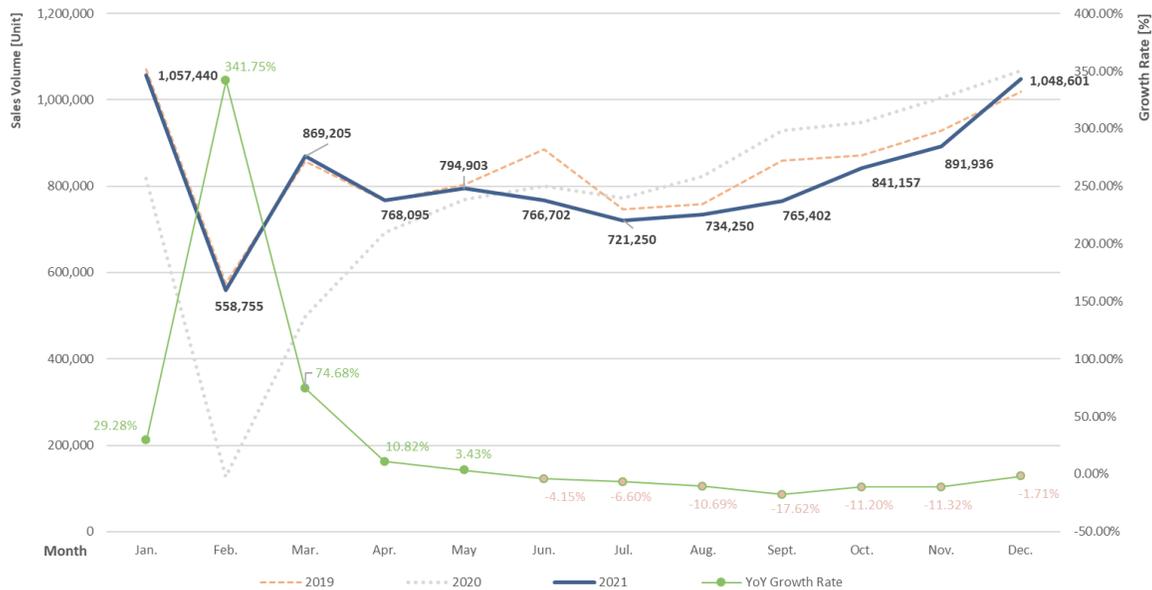
9.81 Million

- In 2021, the total sales of Sedan reached **9.81 million**. Overall sales increase **6.17%** than 2020.

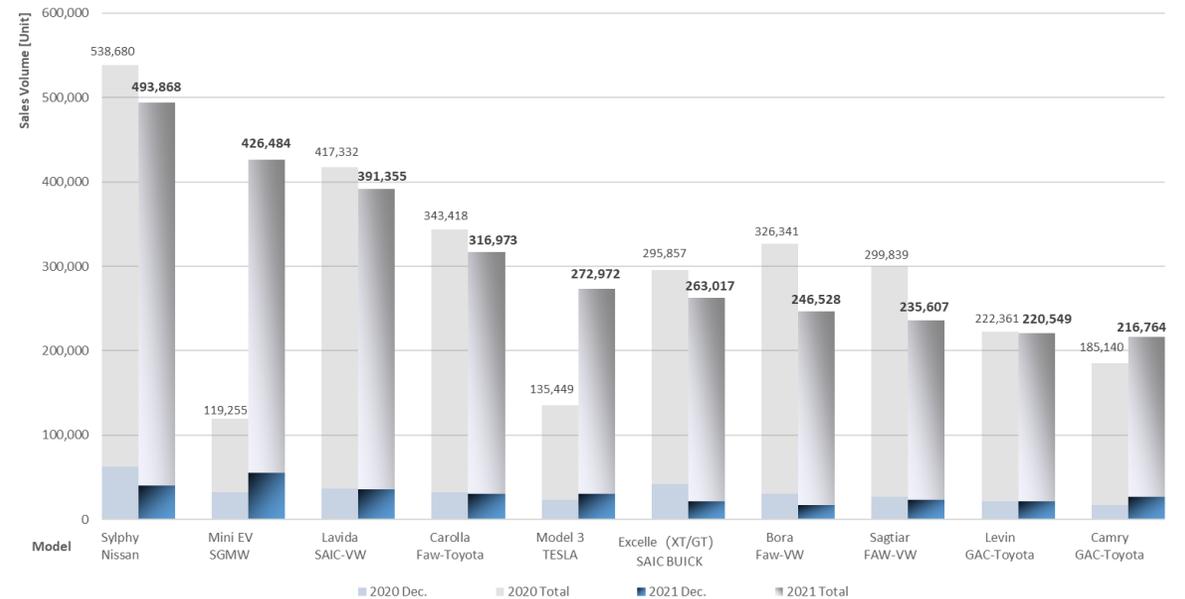
Sylphy Nissan

- **Sylphy** is still the best-selling sedan in China, with a total sales of **493,868** units in 2021, but a year-on-year decrease of **8.32%**. NEV such as **Mini EV** and **Tesla** have increased in sales and have a larger rate in 2021.

Jan. ~ Dec. 2021 Sedan Sales Data



Jan. ~ Dec. 2021 Sedan Sales TOP 10



SUV

11.44%↓

- SUV sale in December was **959,751**, decrease **11.44%** than 2020, and increase **14.18%** on the previous month.

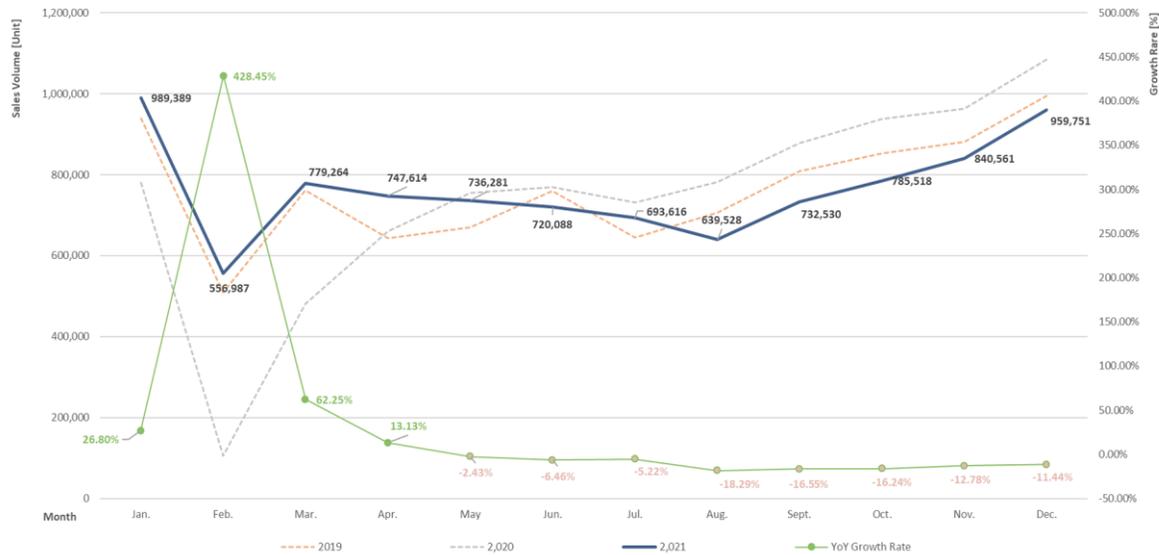
9.18 Million

- In 2021, the total sales of SUV reached **9.18 million**. Overall sales increase **2.83%** than 2020.

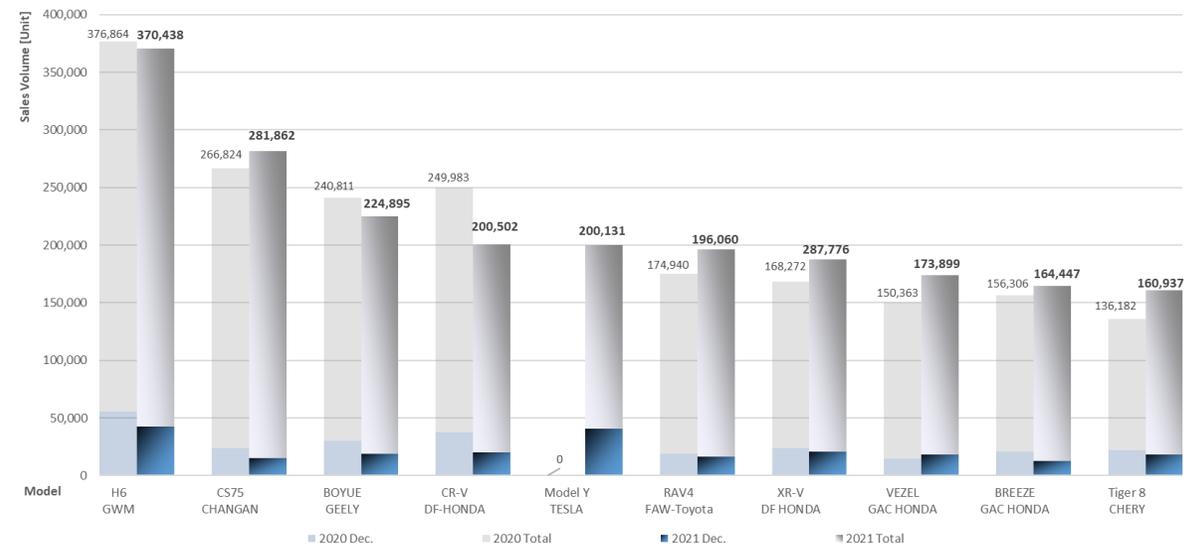
H6 GWM

- Among the SUV, the **GWM H6** had the highest annual sales volume, with a cumulative sales of **370,438** units, a year-on-year decrease of **1.71%**.

Jan. ~ Dec. 2021 SUV Sales Data



Jan. ~ Dec. 2021 SUV Sales TOP 10



MPV

11.44%↓

- MPV sale in December was **96,888**, decrease **29.55%** than 2020, increase **15.38%** on the previous month.

1.07 Million

- In 2021, the total sales of SUV reached **1.07 million**. Overall sales decrease **1.64%** than 2020.

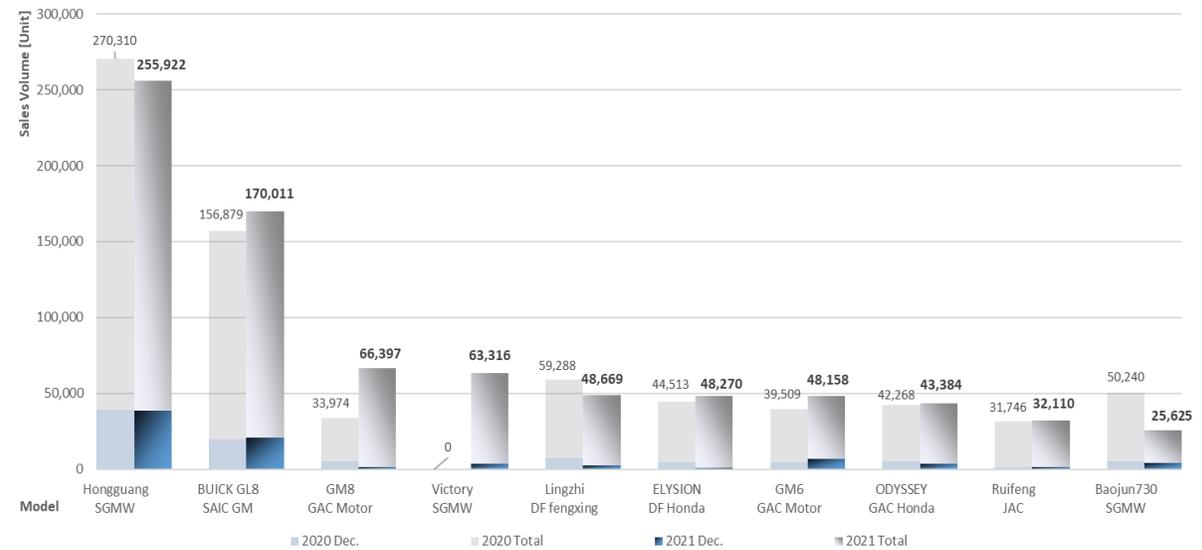
Hongguang SGMW

- Among the MPV, **Hongguang** still the best model in MPV. In 2021 sales **255,922** units, with a year-on-year decrease of **5.32%**.

Jan. ~ Dec. 2021 MPV Sales Data



Jan. ~ Dec. 2021 MPV Sales Data TOP 10



New Energy Vehicle



BEV

125.87% ↑

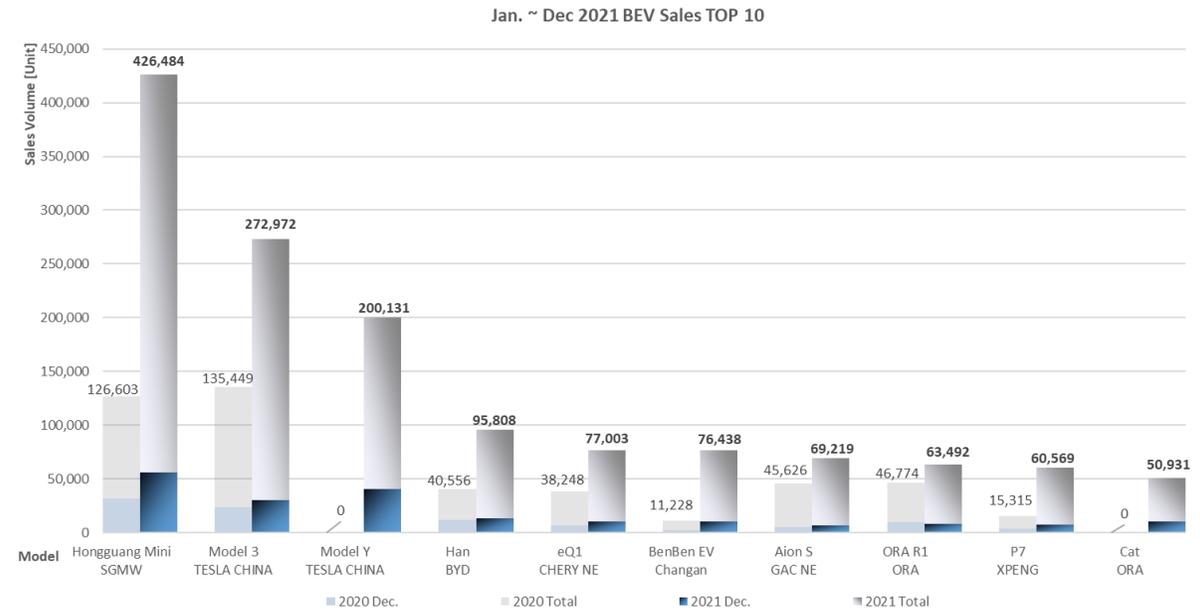
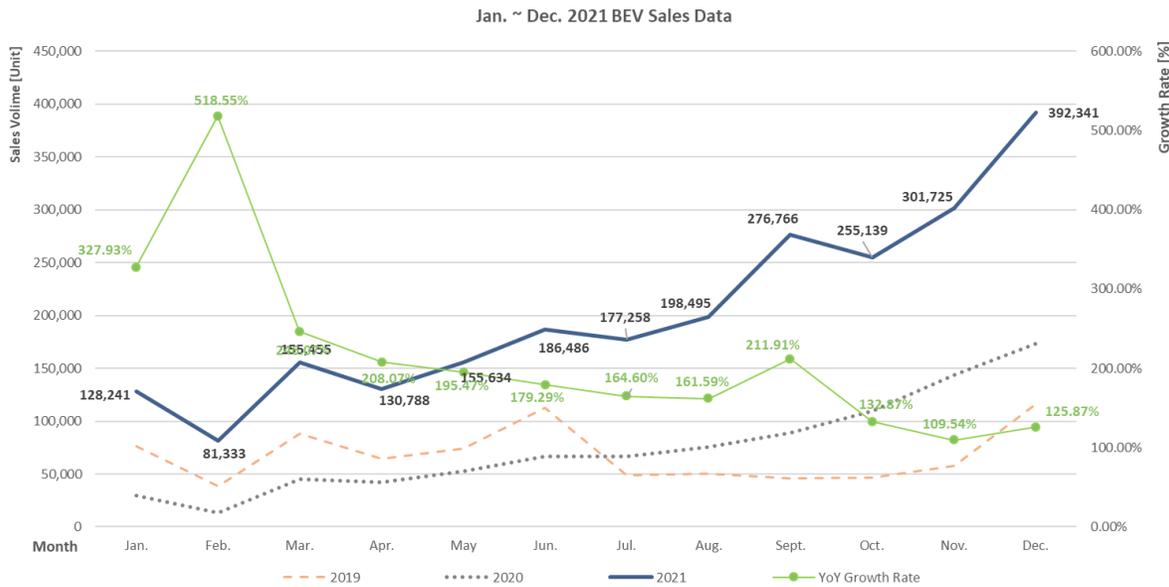
- BEV sale in December was **392,341**, increase **125.87%** than 2020 and set a new sales record. MoM increase **30.03%**.

2.43 Million

- By December, the total sales of BEV reached **2.43 million**, increase **168.45%** than last year.

SGWM MINI EV

- The best-selling BEV in 2021 is **Mini EV**, with a total sales of **426,484** units, a year-on-year increase of **236.87%**, followed by **Model 3** and **Model Y** with **272,972** and **200,131** units.



PHEV

141.60% ↑

- PHEV sale in December was **82,546**, increase **141.60%** than 2020, and MoM increase **7.53%**.

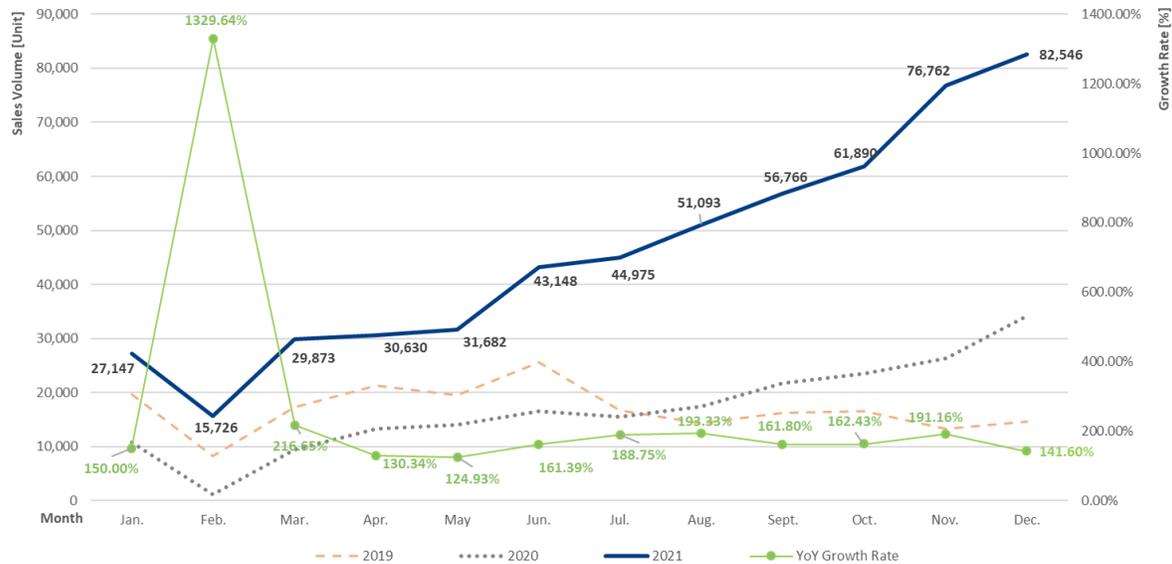
0.55 Million

- By December, the total sales of PHEV reached **0.55 million**, increase **170.61%** than last year.

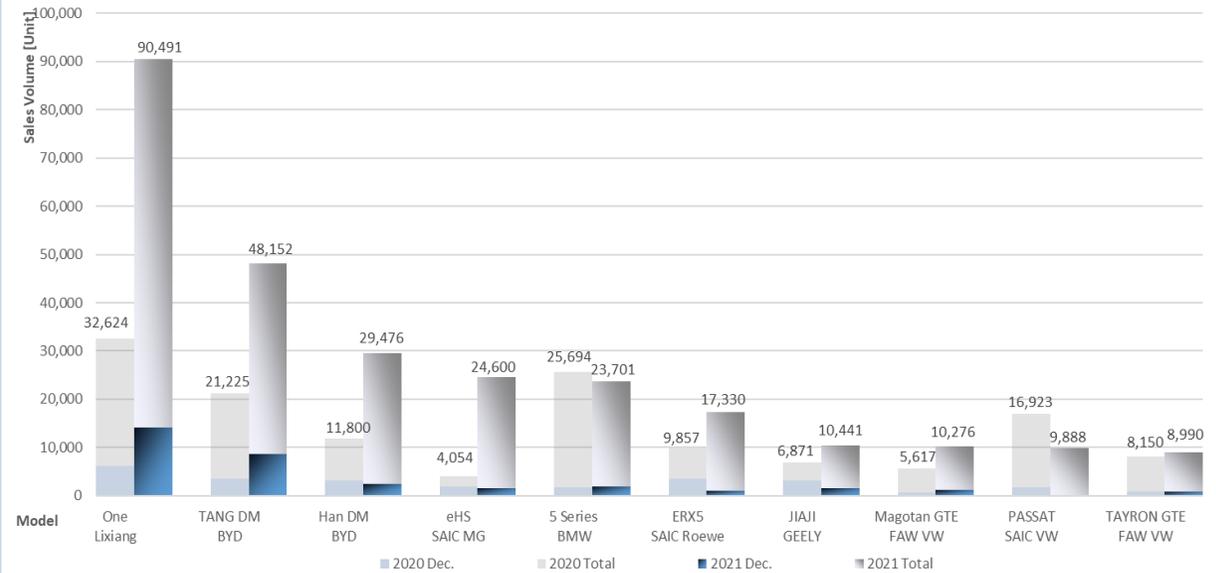
Lixiang One

- As a REEV model, **Lixiang One** became the PHEV sales champion, reaching **90,491** units, a year-on-year increase of **177.38%**.

Jan. ~ Dec. 2021 PHEV Sales Data



Jan. ~ Dec. 2021 PHEV Sales TOP 10



Commercial Vehicle Sales



Commercial Vehicle Sales Data

0.38 million

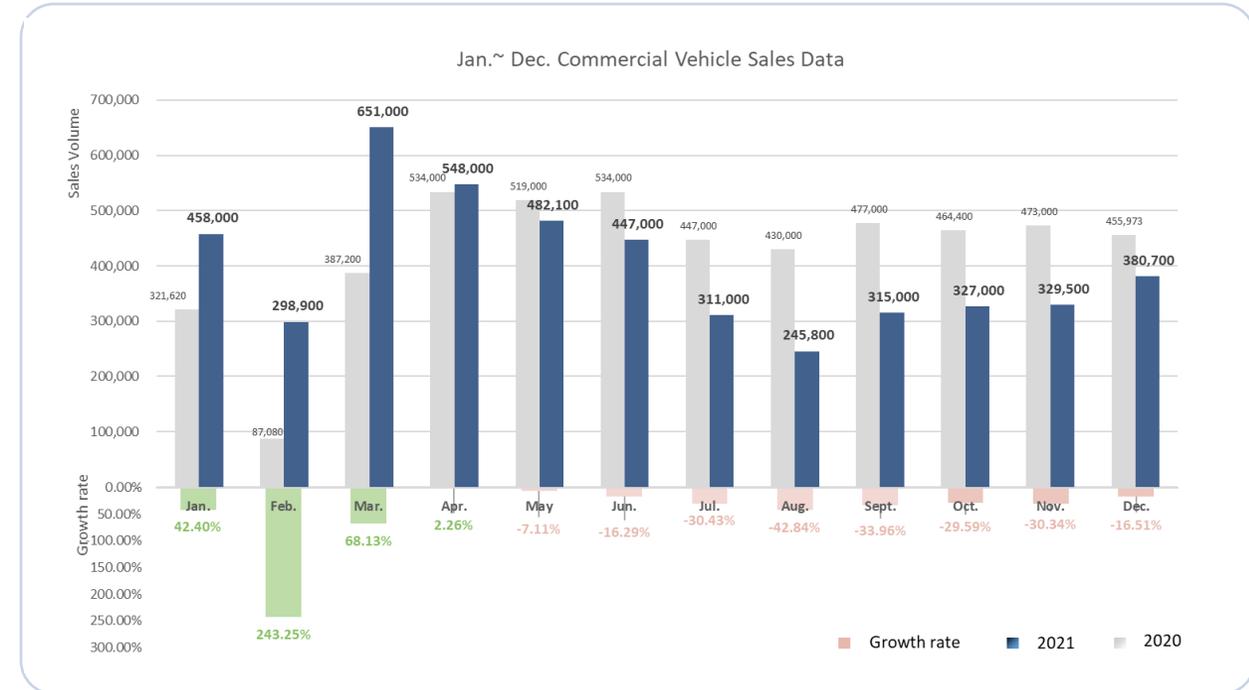
- In December, the sales volume of Chinese Commercial vehicles was **0.38 million**.

16.51% ↓

- In December, the sales of commercial vehicles increased to a certain extent, up **15.54%** month-on-month, and the sales gap decreased compared with the **16.51%** decline in the same period in 2020, but there was still a certain gap.

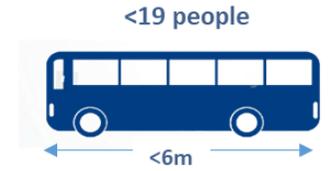
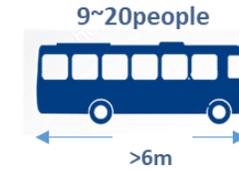
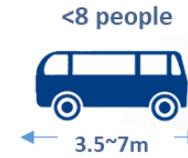
0.53% ↑

- As of 2021, the sales volume of commercial vehicles in China will show a downward trend compared with 2020, with a total of about **4.79 million** vehicles in the whole year, a year-on-year decrease of **6.56%**.



	Total Jan. ~ Dec.	Compare with 2020	Growth rate
2020	5,130,000	-336,000	-6.56%
2021	4,794,000		

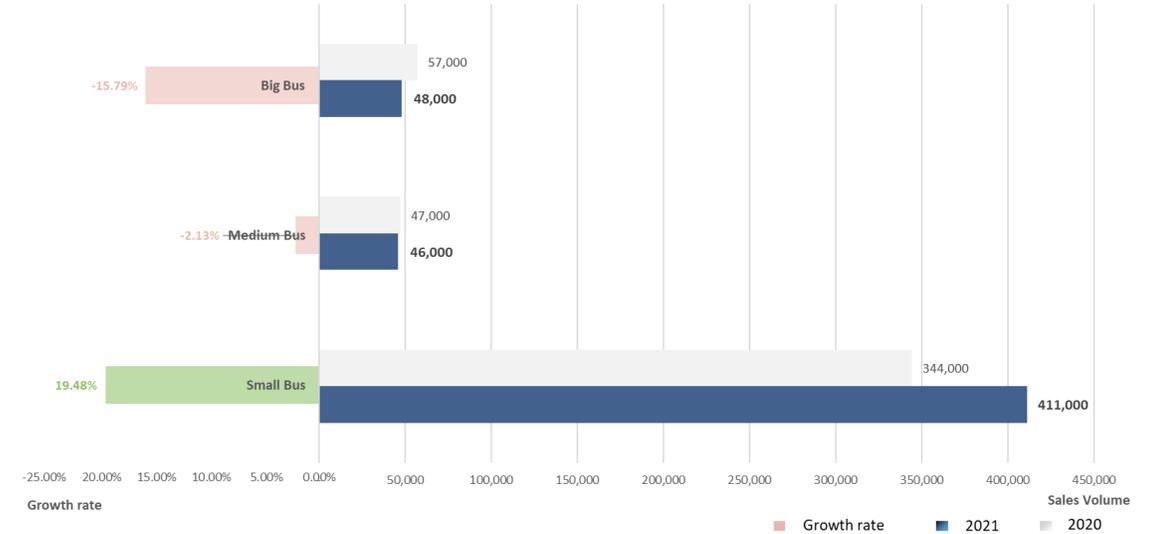
Each Models Sales Data



Q1~Q4 (2021 VS 2020) Truck models Sales



Q1~ Q4 (2021 VS 2020) Bus models Sales



Subjective Summary

- ❑ In 2021, the virus is continue to spread, and its impact has already involved all aspects - the rise of raw materials, the shortage of chips... It has formed a big impact on the automotive industry. In this background, a series of environmental issues such as reducing carbon emissions, carbon neutrality, and green travel have become the second hot spot of global concern after the epidemic. While global car sales are declining, sales of NEV are growing explosively; passenger car sales in Europe in 2021 will be **11.77 million** units, a year-on-year decrease of **1.53%**, while the annual sales of new energy vehicles will be **2.36 million** units, a year-on-year increase of **72.87%** , accounting for **20.05%**, creating a new high.
- ❑ 2021 is a critical period for Chinese auto industry to switch from fossil fuels to new energy sources. In December 2021, the sales volume of China's passenger vehicle market reached **2.10 million** units, a year-on-year decrease of **7.99%**. Looking back at the full year of 2021, with a cumulative sales volume of **20.07 million** units, a year-on-year increase of **4.18%**, ending the three consecutive years of decline since 2018. The trend for the whole year is that in the first quarter, due to the low base in the same period, the auto market grew rapidly year-on-year, and the growth rate in the second quarter declined.
- ❑ Chinese NEV have become the biggest bright spot in 2021, maintaining a growth trend throughout the year. The sales volume in December was **474,000** units, a year-on-year increase of **128.45%**. A total accumulate volume were of **2.99 million** throughout the year, with a market share of **14.9%**, a rapid increase from **5.84%** in 2020, which further shows that the NEV market has shifted from policy-driven to market-driven. Among them, the cumulative sales of BEV accounted for **12.2%**, and the PHEV accounted for **2.8%**.
- ❑ In 2021, Chinese commercial vehicles will end the growth trend of last year. Coupled with the implementation of the Nation VI emission standards, a series of reasons will reduce the sales of commercial vehicles. The cumulative sales in 2021 were **4.79 million** units, a year-on-year decrease of **6.55%**. In terms of models, Medium Truck and Small Bus were the only models that was growth, with year-on-year growth of **11.50%** and **19.48%**.

News & Policy



News (2021 Dec.~ 2022 Jan.)



On January 11, the Japan Automobile Importers Association said registrations of electric vehicles imported by Japan from other countries totaled 8,610 last year, up 165 percent from 3,238 in 2020. The association also said that sales of imported gasoline-electric hybrid vehicles rose to 37,530 units from 13,465 units in 2020. In addition, electric vehicles imported by Japan accounted for 3.3% of all imported vehicles, also up from 1.3% in 2020.

——Gasgoo

GEELY

According to related reports in December 2021, the joint venture company jointly invested and established by Lifan and Geely mainly provides a complete set of solutions including battery replacement products and battery replacement services for B-end and C-end users. Ruilan Auto will launch a variety of power form products in the future. Based on self-developed battery swap technology, Ruilan Auto is committed to building an intelligent battery swap ecosystem and providing competitive battery swap products and services to the market. —— Autohome



ŠKODA

Skoda and Etnetera form a joint venture. By combining Etnetera's expertise and agile development approach to advance its digital strategy, the company aims to optimize the user experience and launch the next generation of software for the electric vehicle era.

——Gasgoo



The Ministry of Communications announced the total road cargo transportation volume in 2021. In 2021, the national road cargo transportation volume accumulated to 39,138.89 million tons, a year-on-year increase of 14.2%, and the annual cumulative cargo turnover was 615,533,980,000 tons, a year-on-year increase of 14.8%. —— 360che

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