2022

April

Auto Sales China

GETEC Market Report

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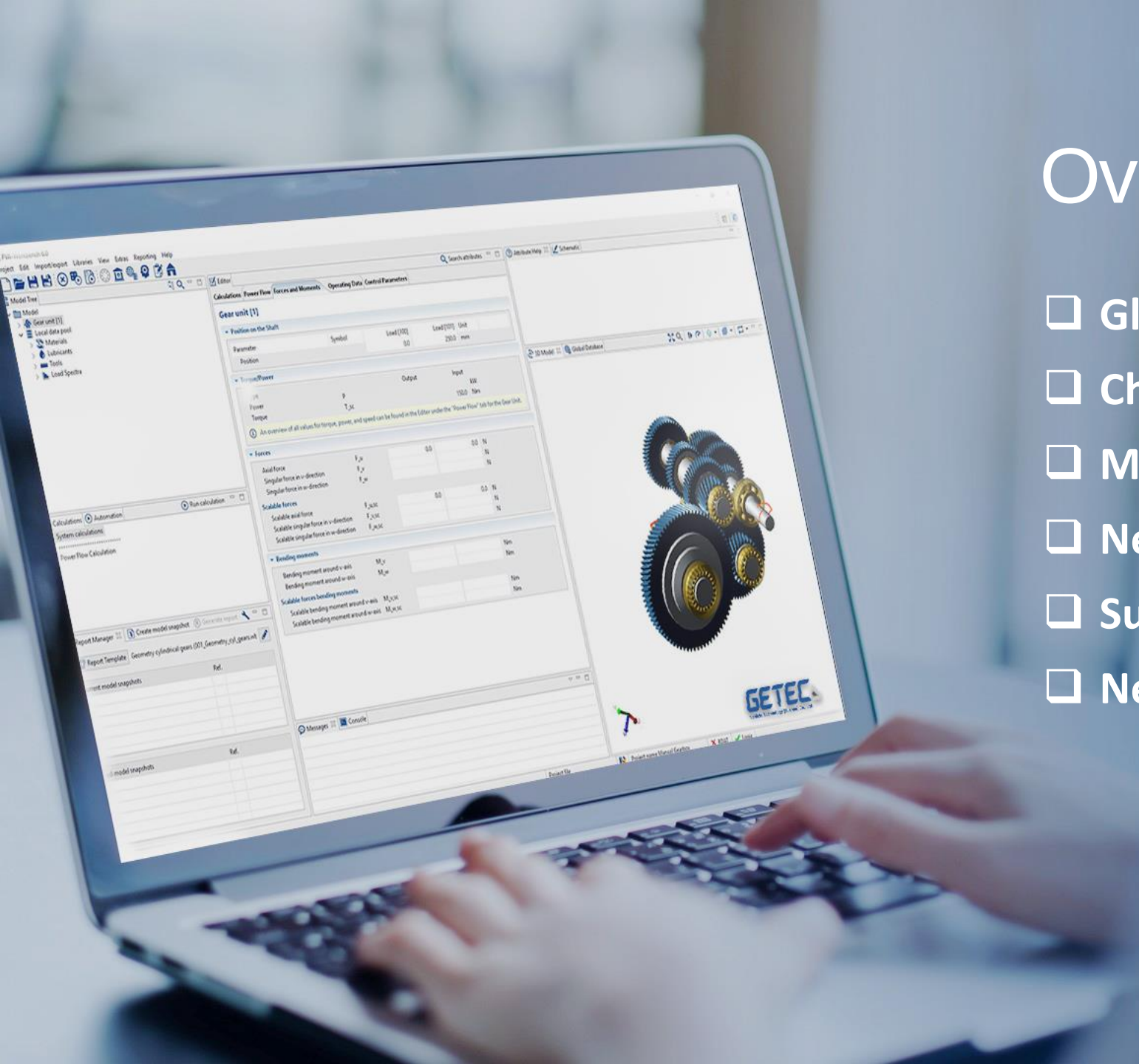
Getriebe Technik GmbH



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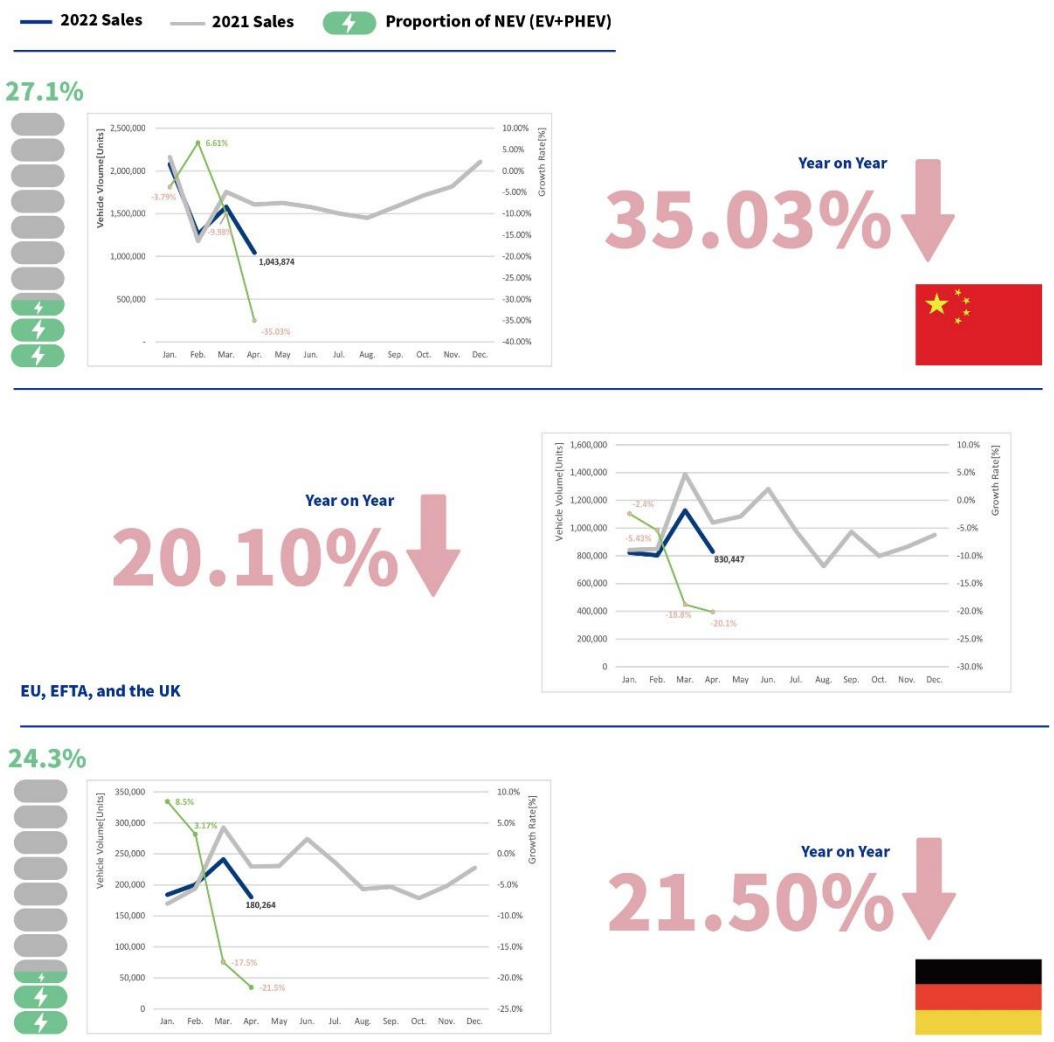
Global Sales Overview

Global Auto Sales

- In April, the virus re-swept in China, and some companies stopped production, the efficiency of logistics and transportation reduced because of the cities strict control, especially in the area around Yangtze River, where auto components are concentrated. Made the sales fell in tandem. Chinese passenger vehicle sales in April were 1.04 million units, and the cumulative sales were 5.96 million units, down 35.03% and 11.07% year-on-year. Chinese NEV has also been affected by the virus. In April, new energy passenger vehicles sold 0.28 million units, a year-on-year increase of 75%, but a month-on-month decrease of 36.47%. The new energy penetration rate was 27.06%, of which BEV accounted for 20.35%, and PHEV is 6.71%.
- European countries continue vehicle production due to supply chain issues. The energy crisis combined with the inflation rate makes the cost of purchasing and using vehicles continue to rise. EU, EFTA and UK new passenger vehicle registrations fell 20.1% year-on-year to 0.83 million units in April. The overall sales volume from January to April was 3.58 million units, a year-on-year decrease of 13.03%.
- A series of problems such as supply chain and rising costs are also affecting Germany, where the number of new vehicle registrations in April was only 0.18 million units, down 21.5% year-on-year. As of the end of April, the cumulative sales of passenger vehicles was 0.81 million units, a year-on-year decrease of 9.02%. The soaring price of fuel has made consumers pay more attention to new energy vehicles. In April, German new energy vehicles sold 43,872 units, with a penetration rate of 24.3%, up 2.2% year-on-year, but sales fell by 13.6% year-on-year, of which 22,175 BEVs and 21,697 PHEVs accounted for 12.3% and 12.0% respectively.



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China Sales Overview in April

China Sales Data

1.04 Million

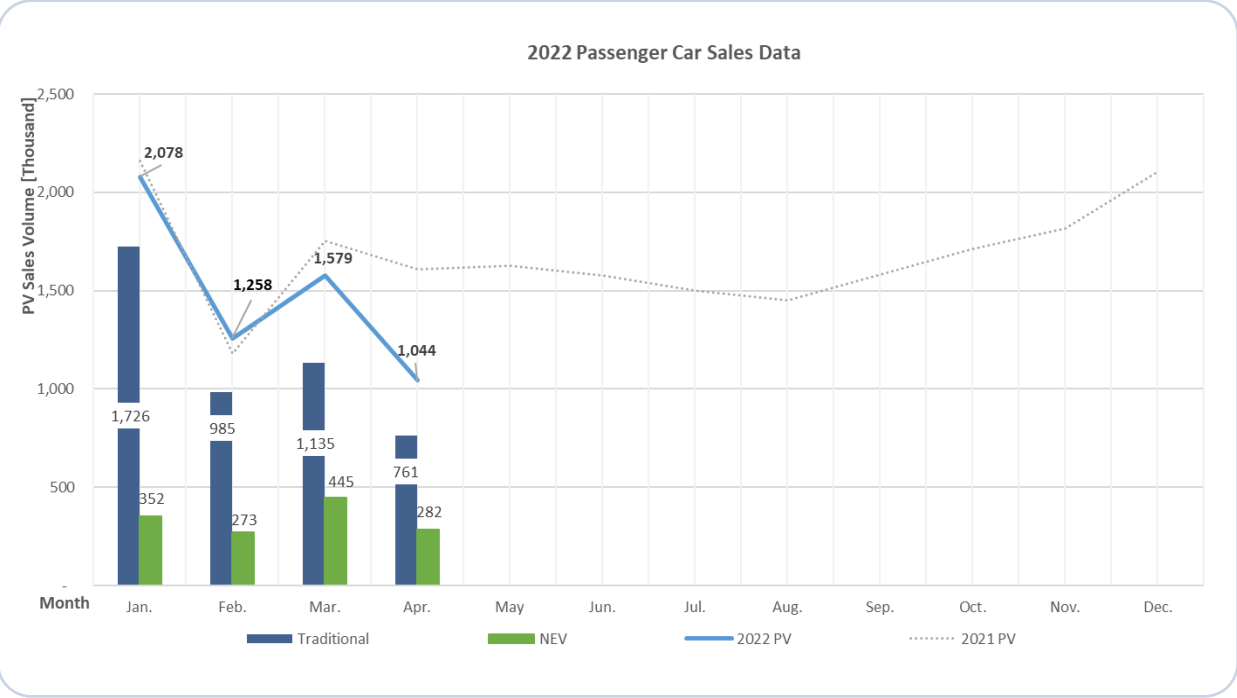
- In April, the sales volume of Chinese passenger vehicles was ***1.04 million*** ,and the lowest sales month until this year.

35.03%↓

- Due to the virus revive in many parts, compared with April 2021, the sales volume this month decreased by *35.03%* YoY， The MoM decrease also reached *33.90%*.

11.07%↓

- By April 2022, the overall sales of Chinese passenger vehicles are ***5.96 million in*** 2022, with a year-on-year decrease of *11.07%*.



Passenger vehicle Monthly Increase （2022 VS 2021）											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
-3.79%	*6.61%*	*-9.98%*	*-35.03%*								

	Total Jan. ~ Apr.	Compare with 2021	Growth rate
2021	6,701,245	*-742,037*	*-11.07%*
2022	5,959,208		

Traditional vs BEV vs PHEV

75.00 % ↑

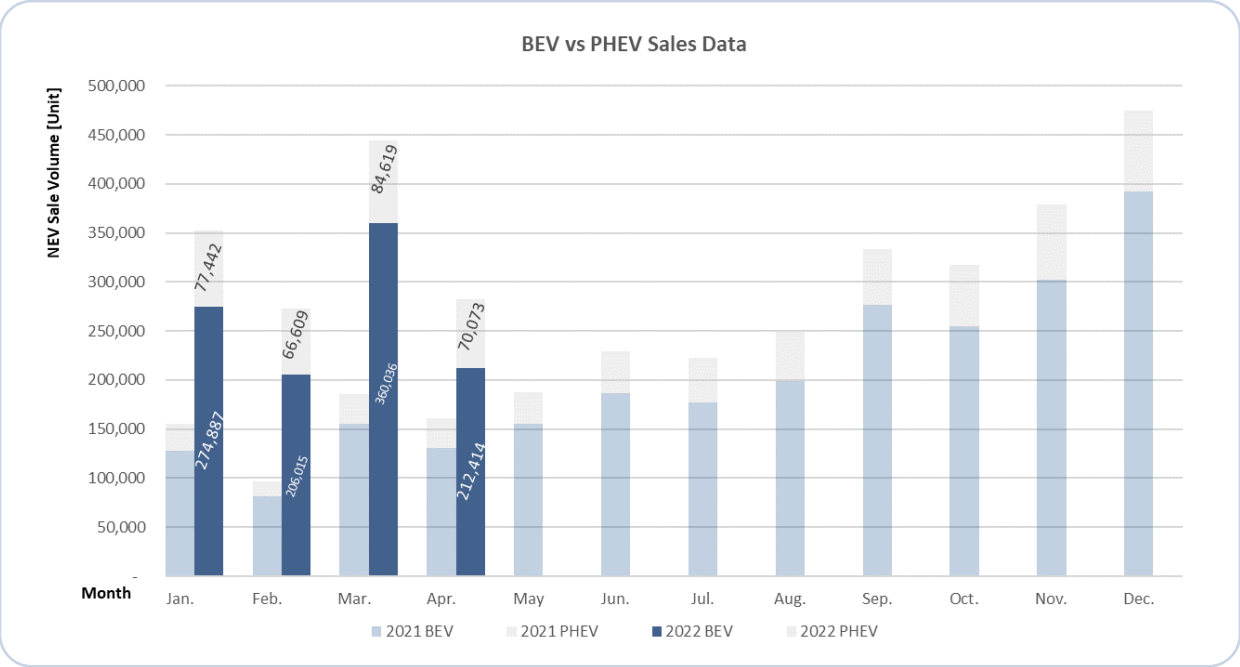
- NEV (BEV+PHEV) sales were ***282,487*** in April, with YoY increase of ***75.00%***, MoM decrease ***36.47%.***

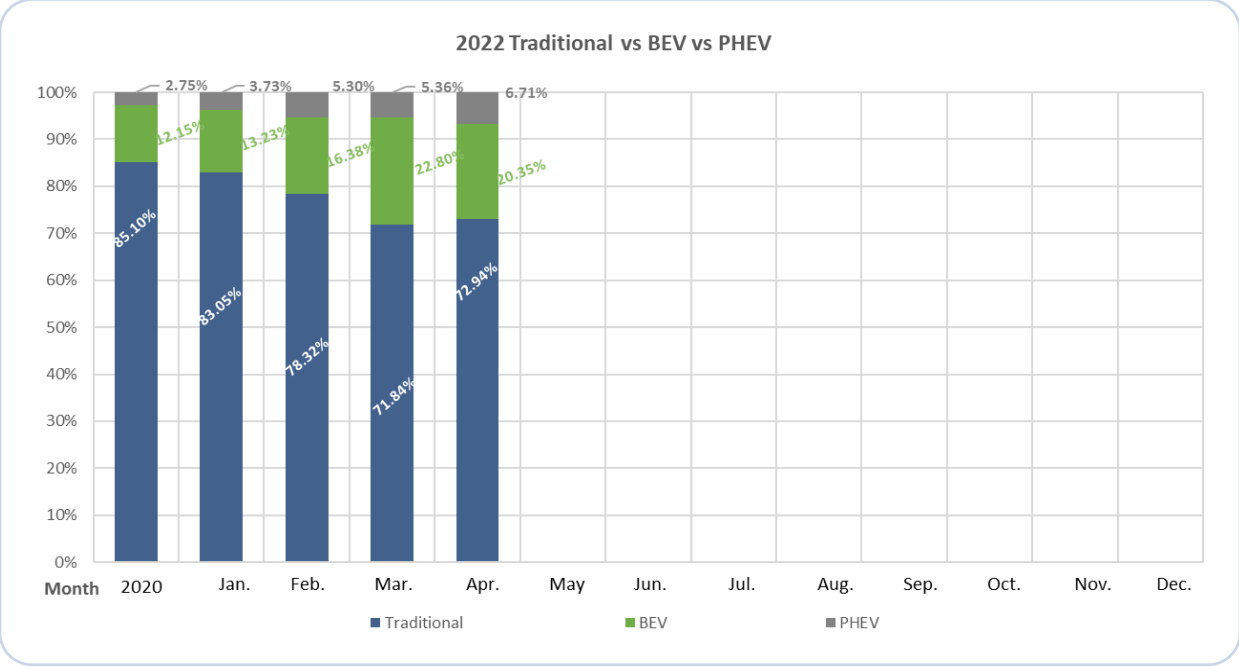
1.35 Million

- By April 2022, the total sales of NEV around ***1.35 million***, more than 2 times YoY.

27.06%

- In April Chinese NEPV account for ***27.06%***, of which BEVs account for ***20.35%*** and PHEVs account for ***6.71%***.





OEM

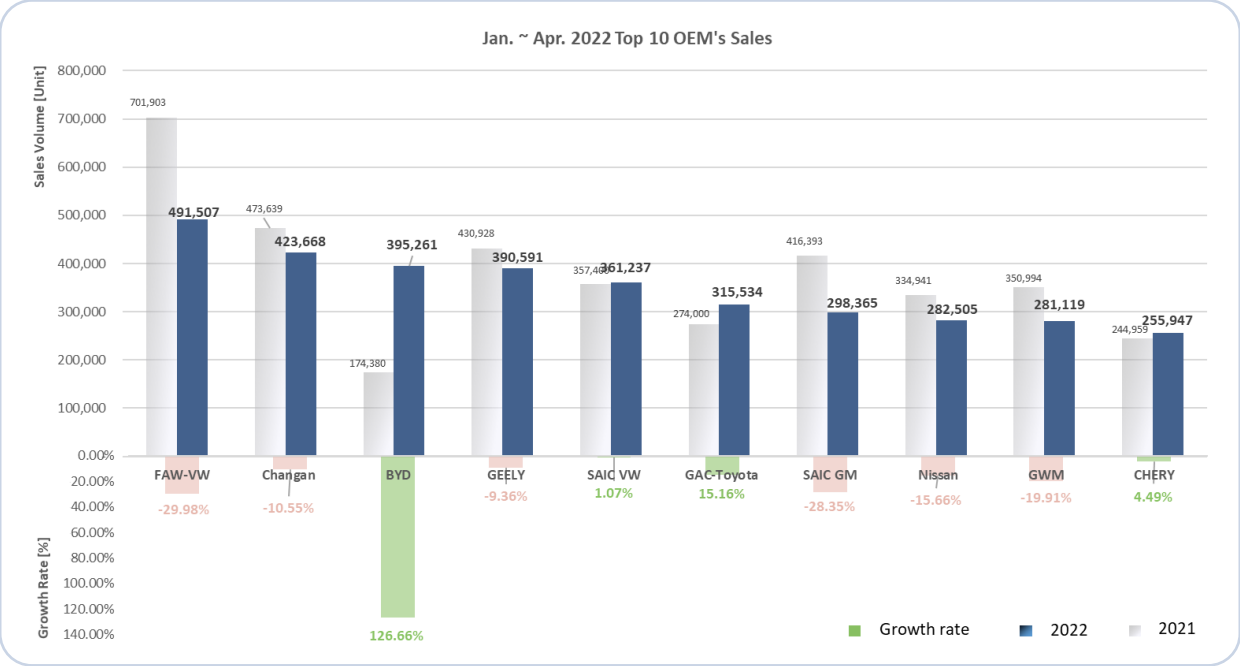
OEM

BYD

- Affected by the Virus in April, the domestic supply chain was severely impacted, and 90% of the top 10 OEMs saw a YoY decline in sales. By **BYD's** own supply chain and other advantages, has less affected, and sales exceeded ***136.46%*** YoY, making it the only company with sales growth.

181.96%

- The impact of the virus in April made the overall sales decline, **BYD** total sales of ***0.39 million*** units, an increase of ***126.66%*** YoY, the growth rate of the first. Total sales first is **FAW-VW** reached ***0.49 million*** units, but the YoY decline of nearly ***30%***.



Model Sales

Sedan

31.34% ↓

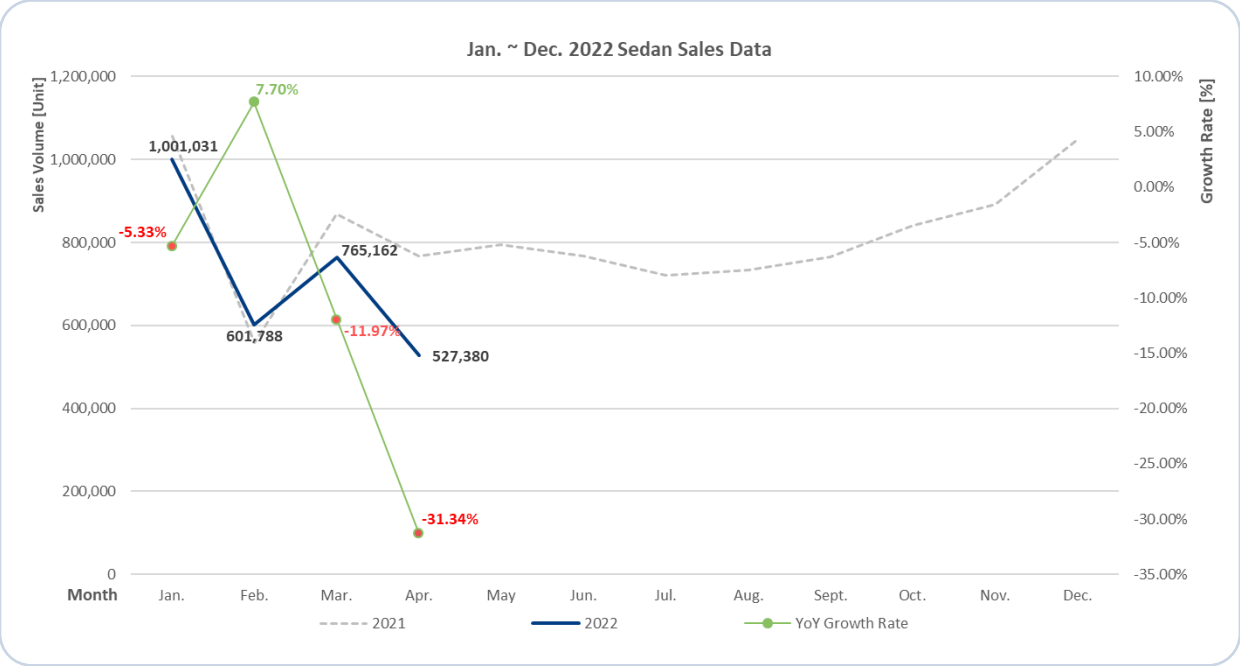
- Sedan sale ***527,380*** in April, decrease *31.34%* YoY, with MoM increase of *31.08%*. Sales have plummeted.

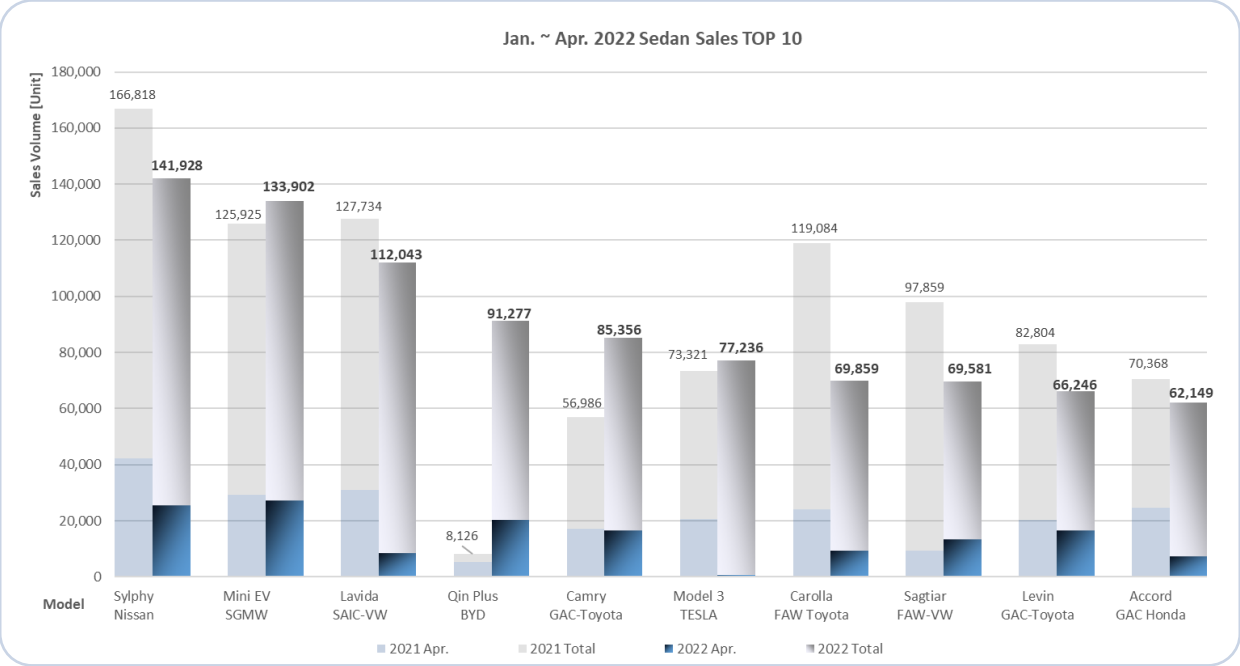
2.89 Million

- End of April, the total sales of Sedan reached ***2.89 million***. Overall sales decrease *11.01%* than 2021.

552 Units

- **Tesla** was most severely affected by the virus, with **Model 3** only sold ***552*** units in April.





SUV

38.31% ↓

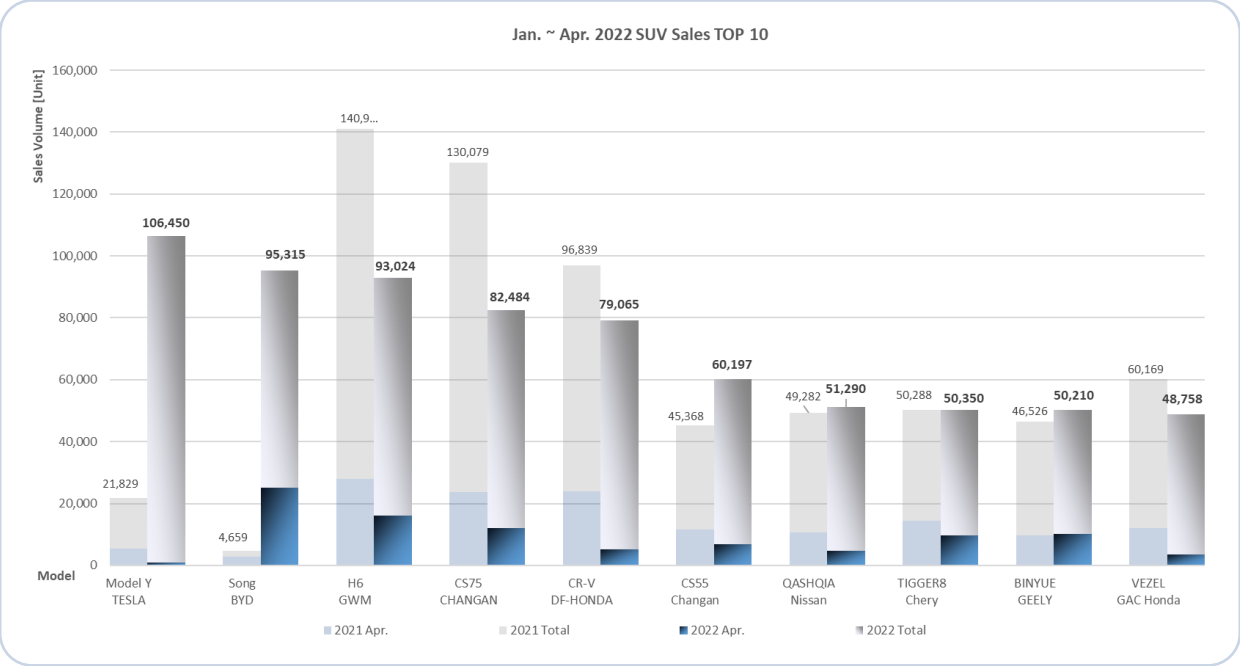
- SUV sale ***461,215*** in April, Sales have fallen off a cliff, decrease *38.31%* YoY, and decrease *37.87%* on the previous month.

2.77 Million

- Until April, the total sales of SUV reached ***2.77 million***. Overall sales decrease *9.89%* than 2021.

Tesla Model Y

- In line with the **Model 3**, **Model Y** sales almost stalled and ***960*** units in April, but overall sales of ***106,450*** units remain the best-selling SUV model in China.



MPV

39.26% ↓

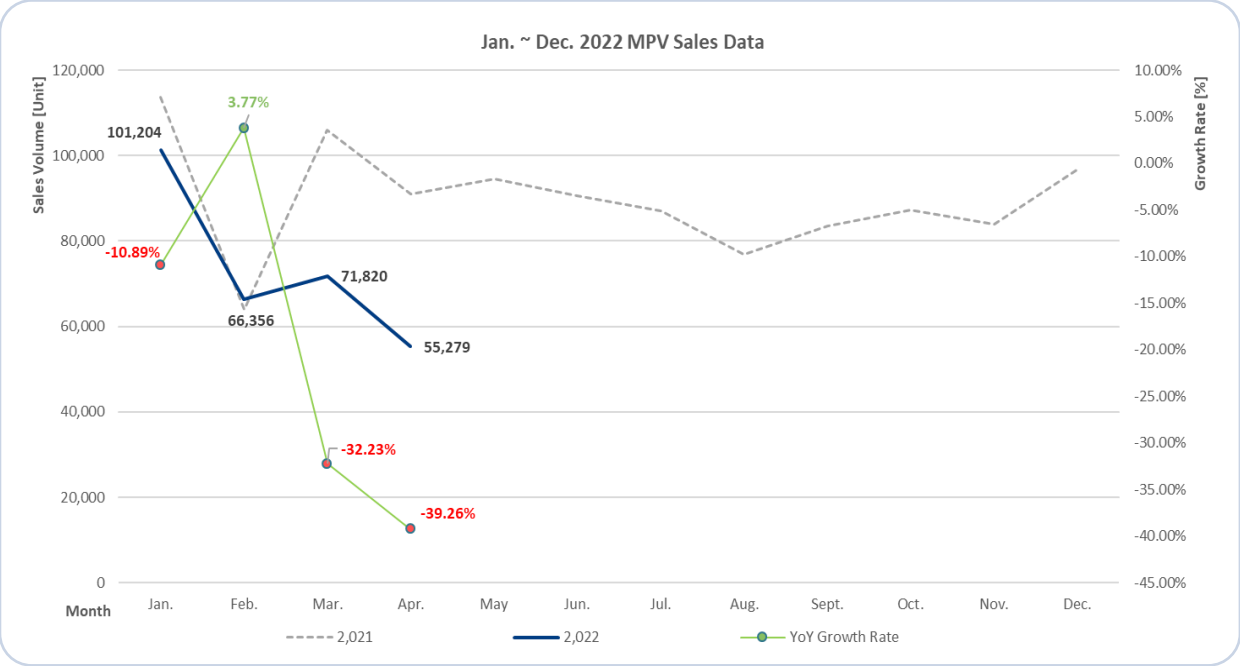
- MPV sale ***55,279*** in March, decrease *39.26%* than 2021, with the biggest drop. And decrease *23.03%* on the previous month.

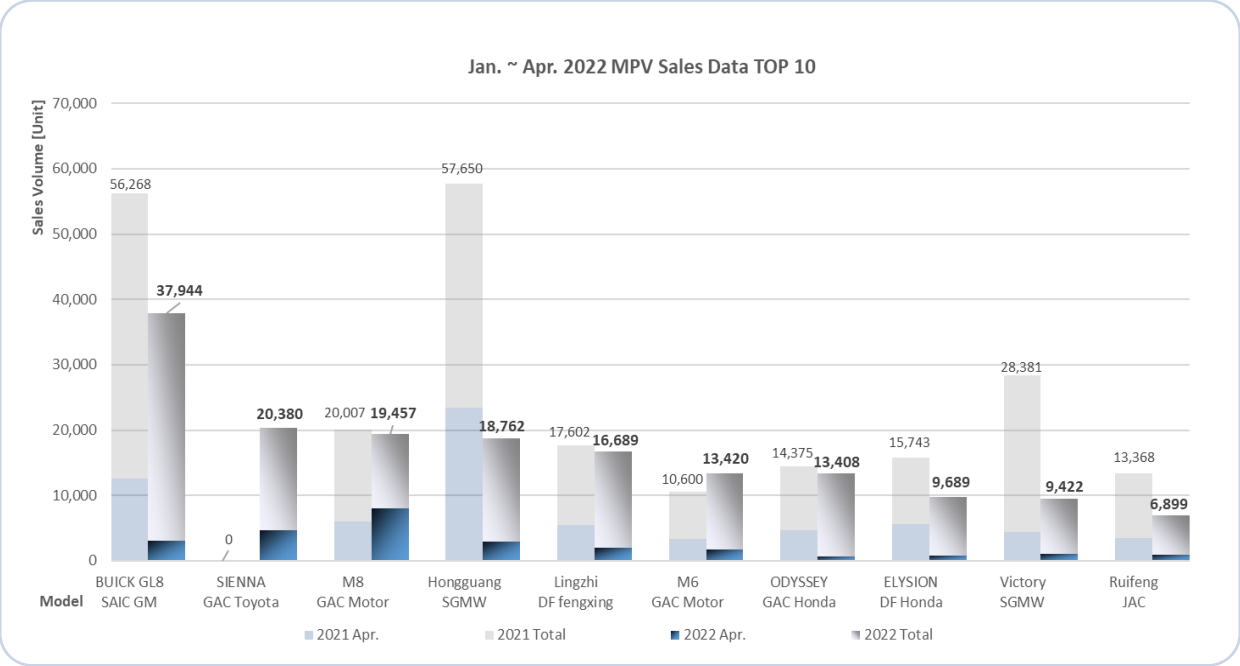
0.29 Million

- End of April, the total sales of MPV reached ***0.29 million***. Overall sales decrease *21.32%* than 2021.

67.46% ↓

- **GAC M8** sold ***8,036*** units and the best-selling MPV in April. While Wuling Hongguang sold ***18,700*** units overall, down *67.46%* year-on-year.





New Energy Vehicle

BEV

62.41% ↑

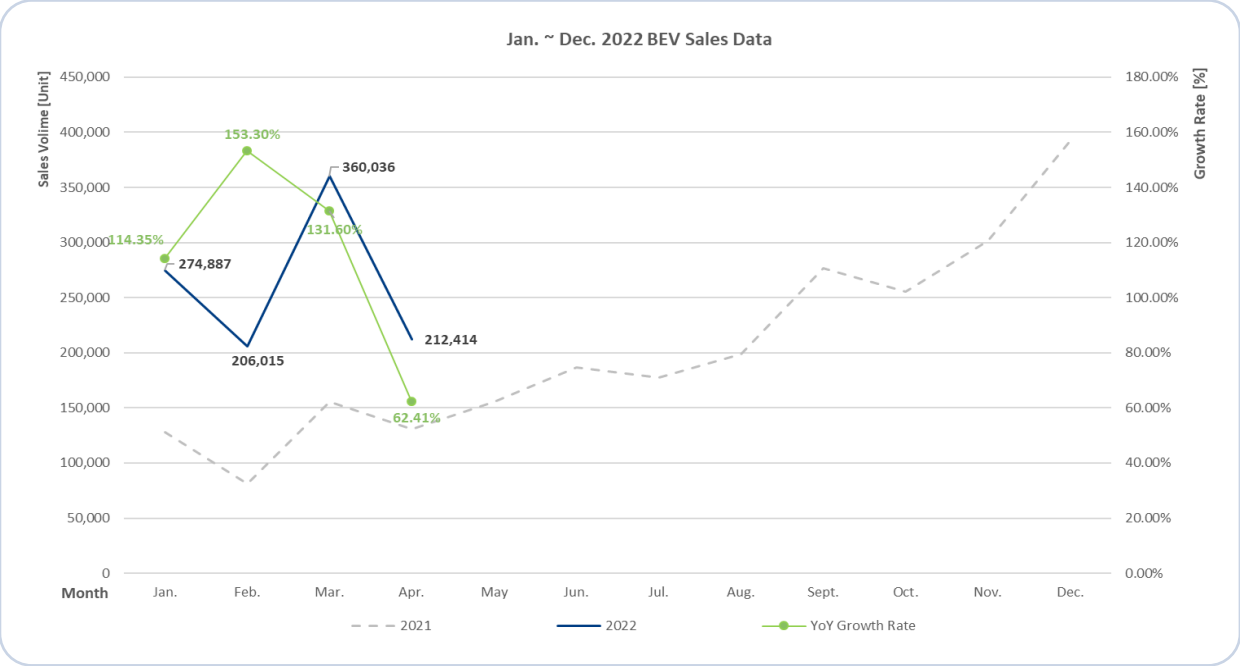
- The impact of the virus has also spread to NEV.BEV sale ***212,414*** in April, increase ***62.41%*** than 2021 and decrease ***41.00%*** MoM.

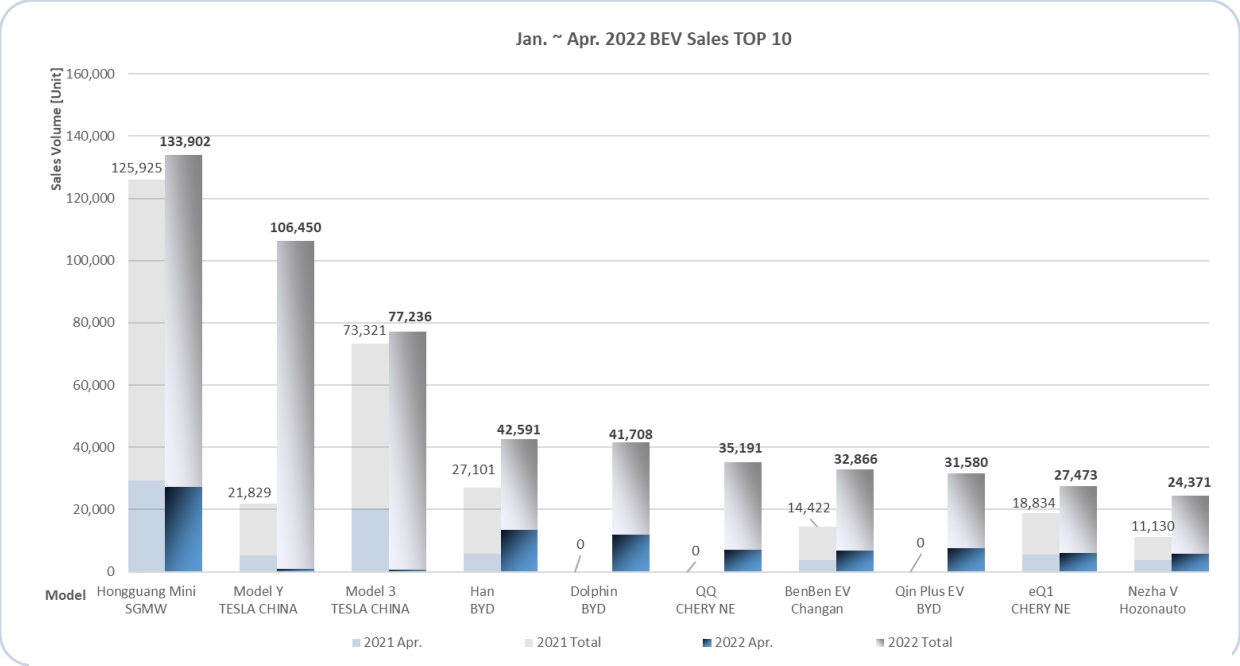
1.05 Million

- Until April, the total sales of BEV reached ***1.05 million***, increase ***112.45%*** than last year.

Tesla

- Sales almost stagnated in April, and it's hard to shake **Tesla's** sales position in China. **Model Y** and **Model 3** increased by ***387.65%*** and ***5.34%*** year-on-year respectively





PHEV

17.19% ↑

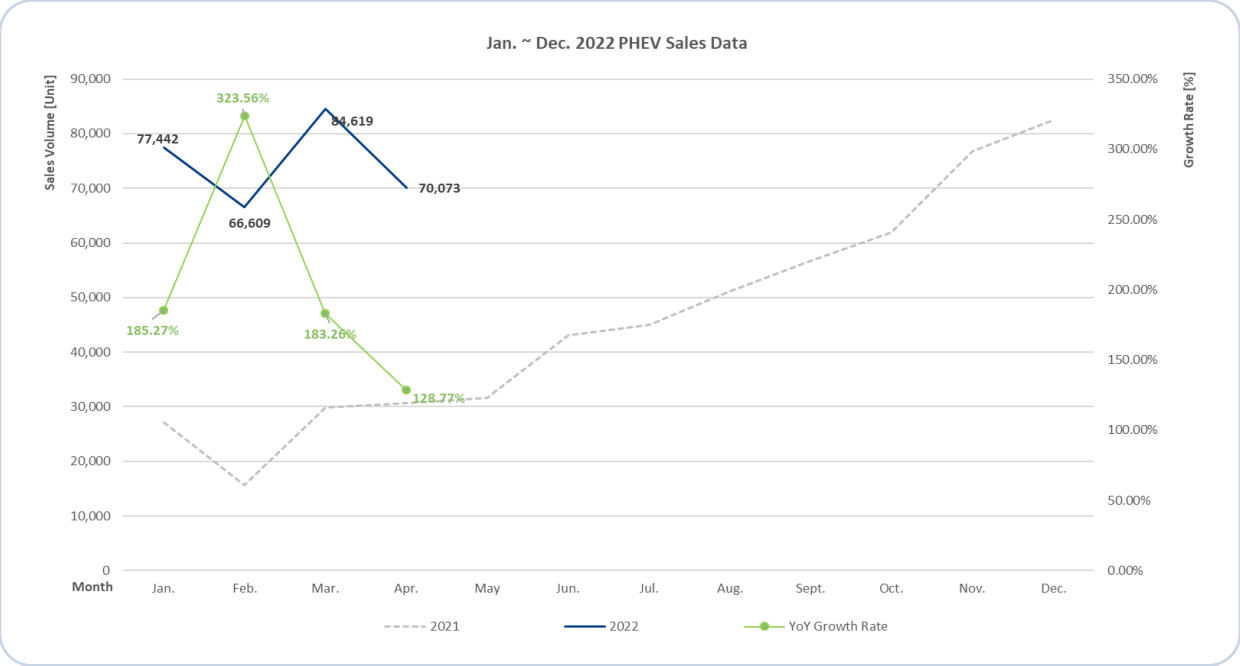
- PHEV sale ***70,073*** in April, increase ***128.77%*** than 2021, and decrease ***17.19%*** MoM.

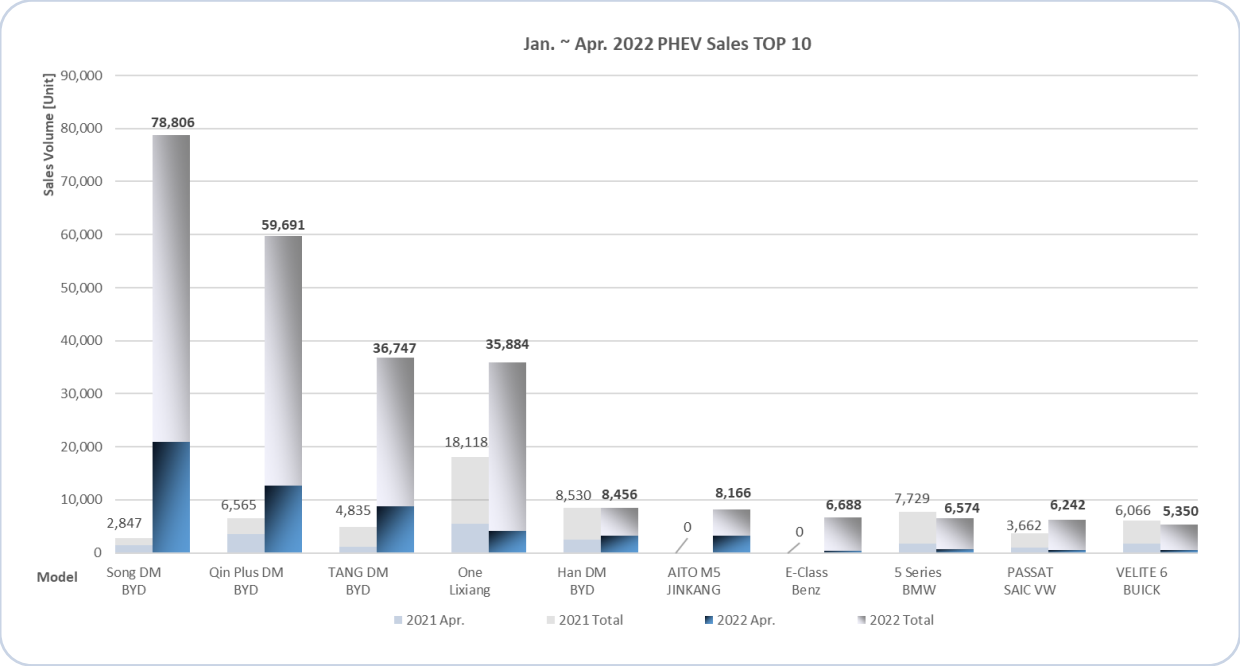
0.29 Million

- End of April, the total sales of PHEV reached ***0.29 million***, increase ***188.99%*** than last year.

BYD

- Among PHEVs, **BYD** has the best sales. With the DM-i hybrid system, The rise in **BYD** sales has led to an overall rise in PHEV sales.





Subjective Summary

- Domestically, the virus recurrence and spread in various places in April, the city strictly controlled, logistics and transport efficiency reduced, some companies shut down production, resulting in a significant drop in the production efficiency of the whole car factory, especially in the Yangtze River Delta, where auto components are concentrated. In addition to the foreign Ukraine crisis led to an increase in risks and challenges beyond expectations, the country is facing new challenges such as stable growth, stable employment, stable prices, the car market is also facing continued severe challenges on both the supply and demand side.

- Chinese passenger vehicle sales in April were ***1.04 million*** units, and the cumulative sales were ***5.96 million*** units, down ***35.03%*** and ***11.07%*** year-on-year. It's the biggest month of sales decline since 2020.

- Chinese new energy development has also been affected by the virus, but under the current environment, self-driving travel has become the first choice. Affected by high oil prices, more and more people will choose to buy NEV. In April 2022, new energy passenger vehicles sold ***0.28 million*** units, a year-on-year increase of ***75%***, but a month-on-month decrease of ***36.47%***. The new energy penetration rate was ***27.06%***, of which BEV accounted for ***20.35%***, and PHEV is ***6.71%***.

- There will be a certain growth in the market after the virus, but compared with 2021, there has been a certain gap. Car companies will also consider the follow-up development situation during the virus to avoid further supply chain disruptions.

News & Policy

News (2022 Mar.~ 2022 Apr.)

In a May 10 press release, General Motors said the company has partnered with Red Hat to develop advanced automotive software solutions. Red Hat's in-car operating system (OS) will provide the functional safety-certified Linux OS foundation for the GM Ultifi software platform, which will be supported by Red Hat in a phased release. The automotive software platform will be available in 2023. Future software solutions, applications and services will be available to customers via over-the-air (OTA) updates.

According to a patent application published by the U.S. Patent and Trademark Office on April 28, Hyundai Motor is developing a four-wheel independent steering system for its future cars. The company intends to equip future products with a four-wheel steering system. By independently changing the steering angle of the four wheels, the system not only allows the vehicle to enter and exit tight spaces with ease, but also rotates in place to improve parking efficiency.

BAIC Group officially launched the pure electric sedan of the Extreme Fox Alpha S HI in China. HI is the abbreviation of Huawei Inside, indicating that it is built with Huawei automotive technology. The Extreme Fox Alpha S HI is the first mass-produced car in the Chinese market to be equipped with Huawei's full-stack smart car solution for electric vehicles. Alfa S HI has two models with different configurations in China. Both models are powered by two electric motors with an output of up to 473 kW and a peak torque of 655 Nm.

On April 28, CARIAD, a software company under Volkswagen (VW), established its Chinese subsidiary. This is CARIAD's first overseas subsidiary outside its European headquarters. Develop applications specific to the Chinese market. The Chinese team will lead and participate in 70% of the R&D work involving new software platform technology stacks and product lines, including local R&D and adaptation, including advanced driver assistance systems (ADAS) and autonomous vehicles, next-generation intelligent connectivity, intelligent cockpit and Body design, big data and software operating systems. Full-stack self-developed, unified and scalable software platform applicable to all brands of the group to meet the specific needs of different markets.

YOUR DEVELOPMENT PARTNER.

THANK YOU

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