



艾凯咨询
ICAN Consulting

2008-2010中国电动汽车产业展望和 market 分析及发展趋势研究报告

一、调研说明

《2008-2010中国电动汽车产业展望和 market 分析及发展趋势研究报告》是艾凯咨询集团经过数月的周密调研，结合国家统计局，行业协会，工商，税务海关等相关数据，由行业内知名专家撰写而成。报告意于成为从事本行业人士经营及投资提供参考的重要依据。

报告主要可分为四大部分，首先，报告对本行业的特征及国内外市场环境进行描述；其次，是本行业的上下游产业链，市场供需状况及竞争格局从宏观到细致的详尽剖析，接着报告中列出数家该行业的重点企业，分析相关经营数据；最后，对该行业未来的发展前景，投资风险给出指导建议。相信该份报告对您把握市场脉搏，知悉竞争对手，进行战略投资具有重要帮助。

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二、摘要、目录、图表

The research and development of electric vehicle in China and in the world is at the same starting line with comparatively small difference in technology level and industrialization. In the “ Tenth Five-year Plan ” , in the consideration of maintaining Chinese energy safety, improving atmosphere environment, increasing vehicle industry competitive strength and realizing great-leap-forward development of Chinese industry, China has established “ electric vehicle significant technological specialty ” to unite to attack key problems by combining strength of enterprises, universities and colleges, research institutes, etc. Investment related to this field in National (863) Plan reached to 0.88 billion RMB. After 4 years of implementation and through the effort of more than 2000 technicians from more than 200 enterprises, universities and colleges and research institutes, the “ electric vehicle significant technological specialty ” of China has achieved great progress. For example, fuel cell vehicle has already successfully developed performance prototype, fuel cell car accumulated to drive for 4000km and fuel battery coach accumulated to run for 8000km; hybrid Vehicle is been tested in bus line of Wuhan, etc. and runs more than 140,000 km; pure electric autos and pure electric coaches have been already passed related certification tests of the country.

At present, China focuses on the research and development of hybrid electric vehicle. There are mainly three types of hybrid electric vehicle according to the mode of energy synthesis, namely, series connected type, parallel connected type and composite type. Recently, all large auto groups in China are doing Hybrid Electric Vehicle research, which are mainly hybrid electric bus research. The direction of this kind of research and development is in accordance with Chinese national situation, being conducive to the research and development of Chinese electric vehicle. The technology of electric vehicle has been further improved in 2007 and several large auto groups in the country will center on self innovation. For pure electric vehicle, Xiali and Shen Long - Fu Kang have new move and it is hopeful to realize mass production of fuel autos in Shanghai. Due to the green and environmental protection concept of 2008 Olympic Games and Expo 2010 Shanghai China, electric vehicle industry will have mass production in 2007 in China by the mode of government procurement.

According to the requirements of the development plan of Chinese auto industry, the development object of Chinese electric vehicle is: to 2010, electric vehicle inventory will account for 5%-10% of auto

inventory and annual production and sales of electric vehicle will reach more than 1.5 million; to 2030, electric vehicle inventory will account for more than 50% of auto inventory and annual production and sales of electric vehicle will reach more than 10-19.5 million. Analyst of our institute predicts that the electric vehicle industry will be more and more competitive in the world in 2008-2010. Auto production great power such as America, Japan and Europe, etc. will strengthen the ability of self research as well as production and sales and will lead the world in the aspect of electric vehicle technology. The largest three groups in China and relevant enterprises will continue to undertake the responsibility of most research projects, which is an industry specialty supported by the country. Chinese electric vehicle in 2007-2008 will continue to be top in the world. Privately operated enterprises will further enlarge export during the marketization attempt. For example, Shandong Jindalu Vehicle Co., Ltd and BYD, etc. have great market prospect. Besides, fairly part of privately operated enterprises will join in the group. The family of hydrogen driven motor vehicles is gradually enlarging in Shanghai and it is hopeful that a hydrogen fuel battery bus demonstration line will constructed in Shanghai and 6 hydrogen driven buses will run in some fixed line in Shanghai. This project will invite public bidding towards international fuel cell vehicle manufacturers. What is more, the first hydrogen station located at Shanghai Jiading international auto city is under construction. According to the research plan of Shanghai fuel cell vehicle, 100 fuel cell vehicles will be mass produced in 2008 which includes 90 fuel cell cars and 10 fuel cell buses and a demonstration vehicle team will form in the Shanghai. To 2009, the production scale will reach 1000 and the products will be put into taxi and bus industry; about 2011-2012, annual output of fuel battery cars will reach ten thousand and gradually put into normal autos.

This report describes thoroughly the operation environment of China ' s Electric Vehicle industry, primarily studies and predicts the long-term and short-term trend of the development and demand change of downstream industry. Aim at the opportunity and threat which the current industry faces, put forward the investment and stratagem advices of the development of Electric Vehicle industry. This report helps the Electric Vehicle industry exactly grasp the development tendency; correctly formulate the enterprise ' s competition stratagem and investment stratagem. Our main sources are in National Bureau of Statistics of China, State Information Center, China Customs, Electric Machinery Association and other authoritative specialty institute and the practical research and study of our center. This report conforms the data resources and expert resources of lots of authoritative institutes, abstracts the precise and appropriate and valuable advices from lots of data, combines the environment which the industry locates, researches and analyzes many points of view from theory to practice and from macroscopic view

to microcosmic view and the conclusion and viewpoint strives to reach the unification of prophecy, practicability and feasibility. It is an elaborate report by the expert group for taking one year of time through the market research and data collection. It is one of the important decision-making basis for the relative investment company and government department exactly grasping the industry development trend and discerning the competition pattern in the industry, evading the operation and investment risk, working out the correct competition and investment risk, working out the correct competition and investment stratagem decision, has the important reference value.

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四、数据来源

对行业内相关的专家、厂商、渠道商、业务（销售）人员及客户进行访谈，获取最新的一手市场资料；

艾凯咨询集团长期监测采集的数据资料；

行业协会、国家统计局、海关总署、国家发改委、工商总局等政府部门和官方机构的数据与资料；

行业公开信息；

行业企业及上、下游企业的季报、年报和其它公开信息；

各类中英文期刊数据库、图书馆、科研院所、高等院校的文献资料；

行业资深专家公开发表的观点；

对行业的重要数据指标进行连续性对比，反映行业发展趋势；

中华人民共和国国家统计局 <http://www.stats.gov.cn>

中华人民共和国国家工商行政管理总局 <http://www.saic.gov.cn>

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中国证券监督管理委员会 <http://www.csrc.gov.cn>

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名行业资深专家顾问，帮助客户分清市场现状和趋势，找准市场定位和切入机会，提出合适中肯的建议，帮助客户实现价值，与客户一同成长。

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