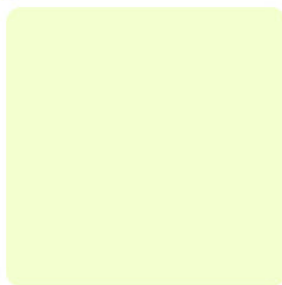


Electric Vehicle

Industry Analysis Report

2013.04



Made-in-China.com



Produced by IAR Team
Focus Technology Co., Ltd.

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Abstract

Judging from the completion of production, the increase of Chinese electric bicycle is particularly evident in 2012. As of the end of December, the two pedal bicycle productions totaled 59.125 million among the main products and increased 1% year on year. Electric bicycle production totaled 20.284 million, an increase of 26.3% year on year, and continued to be a double-digit rate of growth. Chinese electric vehicle exports are about 1.29 million, a decrease of 8.6% year on year in 2011, and exports amounted to approximately \$ 426 million, an increase of 5.7% year on year.

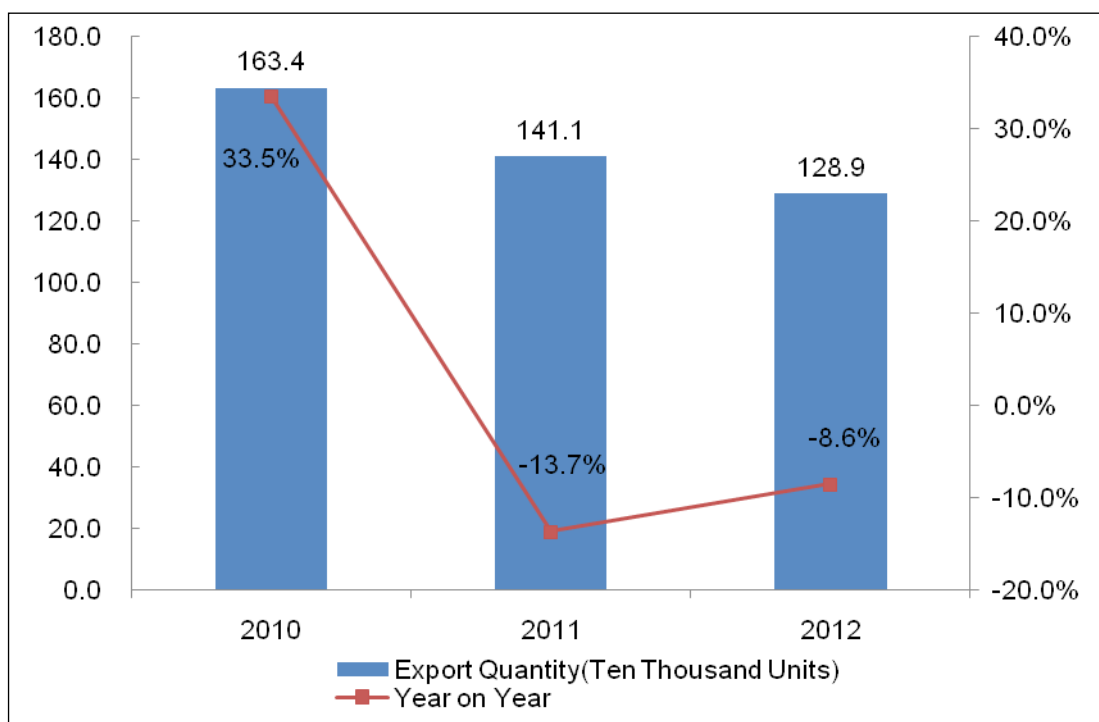
1. Chinese Electric Vehicle Industry Exports from 2010 to 2012

Note:

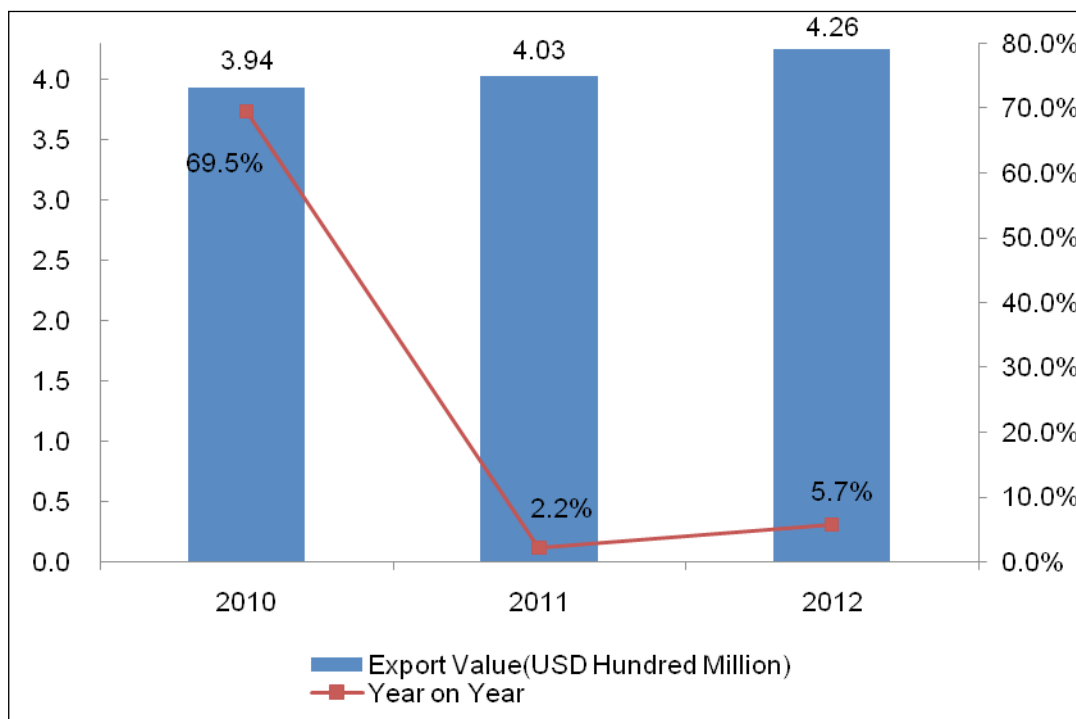
HS: 87119010

Electric motorcycles and electric power bikes, hereinafter referred to as “electric vehicle”

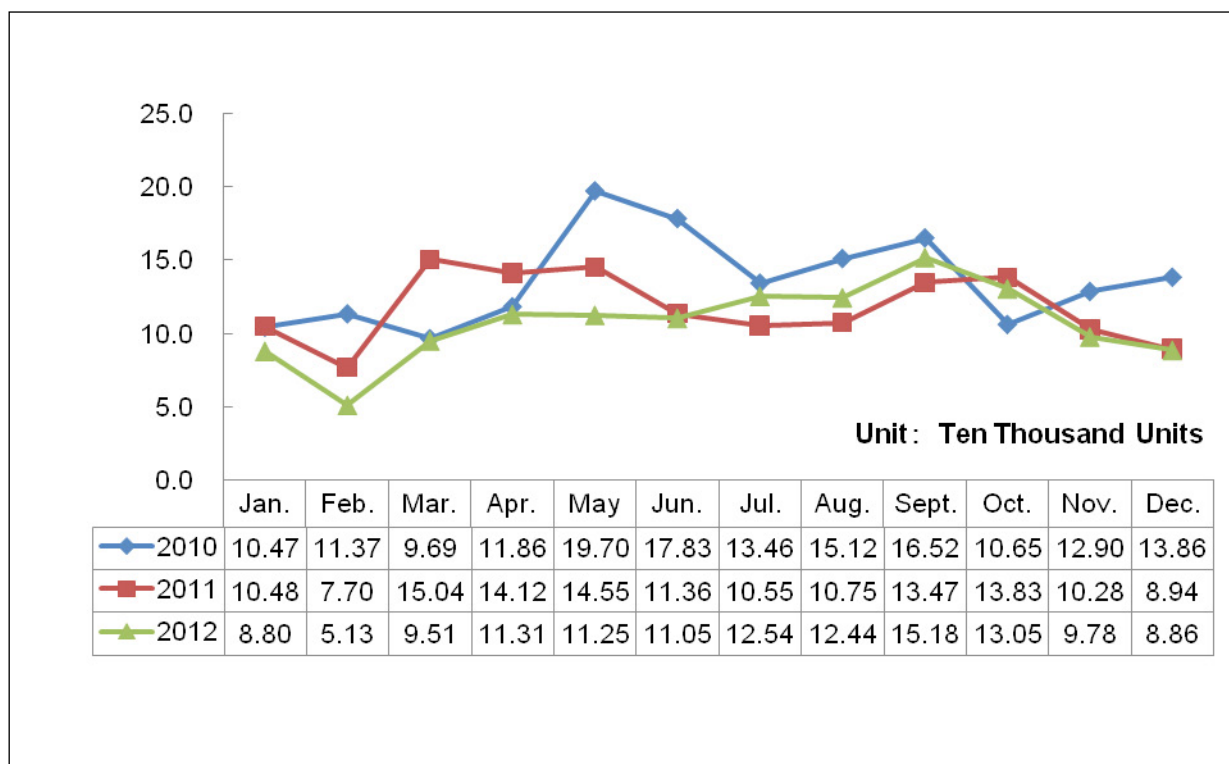
1.1. Chinese Electric Vehicle (HS:87119010) Annual Export Trend from 2010 to 2012



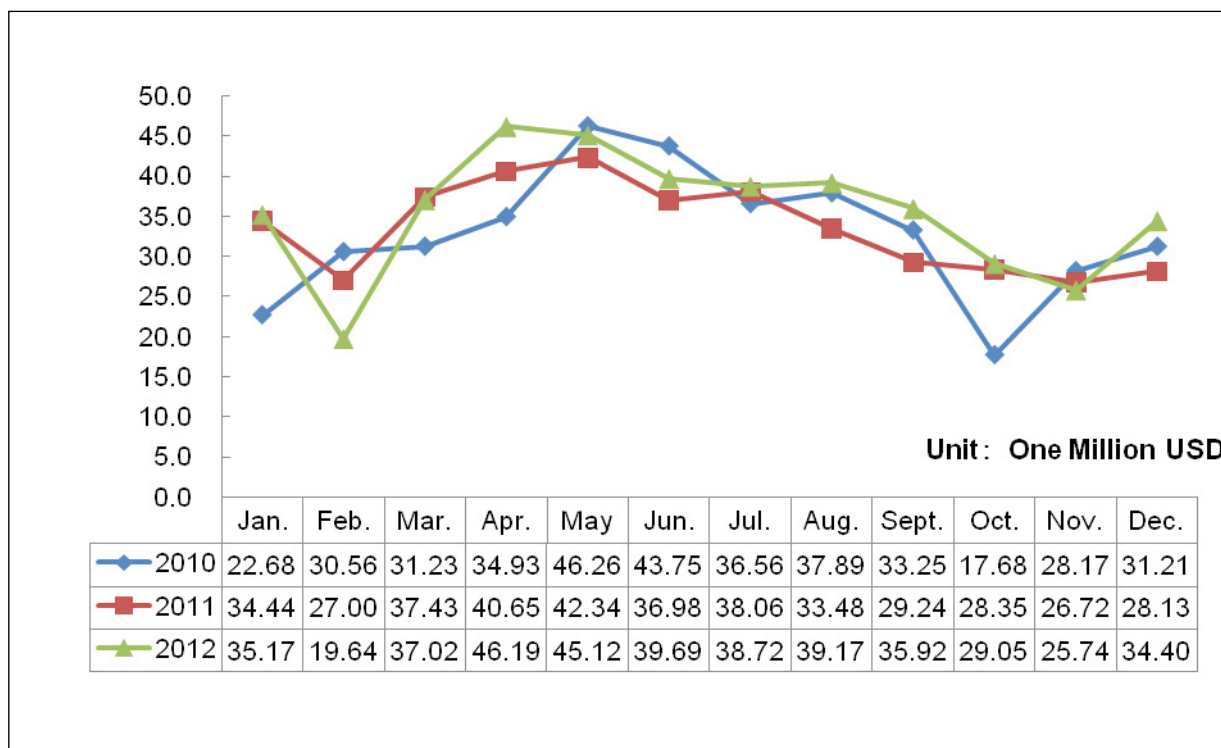
1.2. Chinese Electric Vehicle (HS:87119010) Annual Export Value Trend from 2010 to 2012



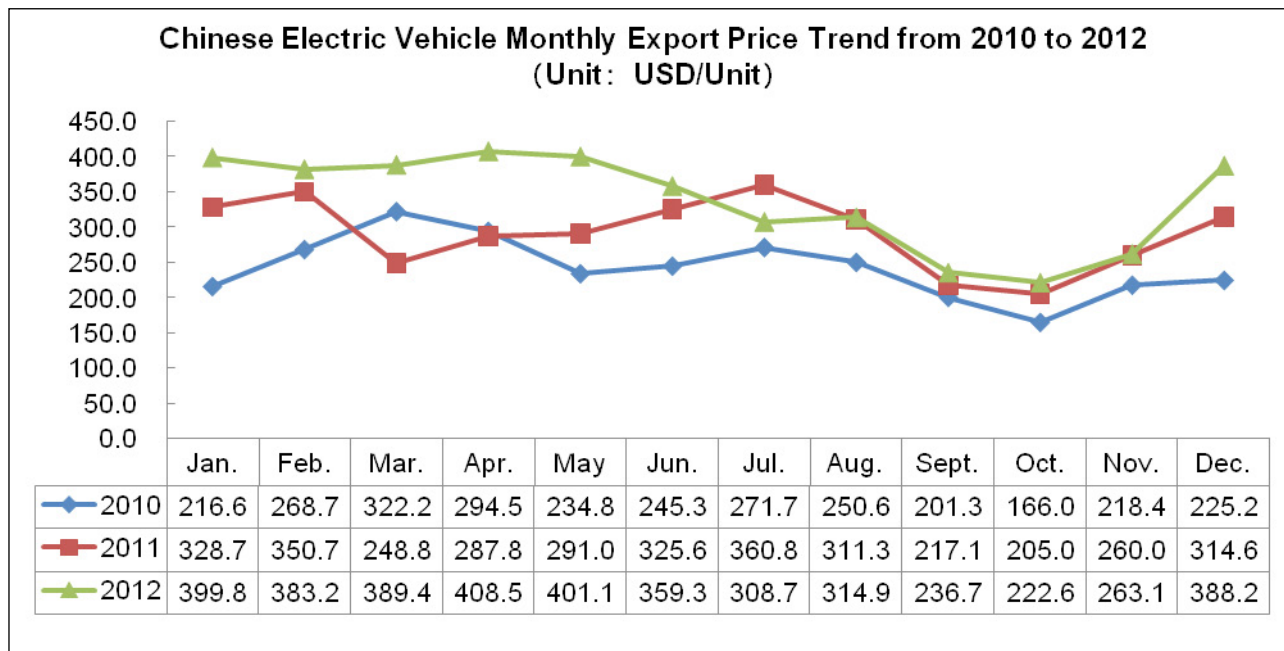
1.3. Chinese Electric Vehicle (HS:87119010) Monthly Export Trend from 2010 to 2012



1.4. Chinese Electric Vehicle (HS:87119010) Monthly Export Value Trend from 2010 to 2012



1.5. Chinese Electric Vehicle (HS:87119010) Monthly Export Price Trend from 2010 to 2012



The volume of Chinese electric vehicle declined, but export value continued to show a rising trend from 2010 to 2012. Export volume in 2011 was about 1.41 million with a decrease of 13.7% year on year in 2010. Export value was about 403 million USD with an increase of 2.2% year on year; Export volume in 2012 was about 1.29 million with a decrease of 8.6% year on year in 2011. Export value was about 426 million USD with an increase of 5.7% year on year.

It can be seen from the export monthly trend that the second quarter is the peak season for annual exports, and the export price in 2012 is generally higher than 2011 and 2010.

1.6. Major Export Countries / Regions for Chinese Electric Vehicle (HS:87119010)(Amount of exports in 2012)

NO.	Export Countries/ Regions	Export Value (USD)			Amount in 2012 Compared with 2010 (%)
		2010	2011	2012	
1	Netherlands	84,812,397	57,719,491	60,455,947	-28.72%
2	Germany	40,864,451	51,059,602	46,186,229	13.02%
3	USA	55,288,730	42,618,435	41,731,932	-24.52%
4	Italy	11,558,866	17,955,910	26,943,733	133.10%
5	Bangladesh	49,928,500	33,125,827	24,518,081	-50.89%
6	Japan	20,327,637	17,813,067	20,650,936	1.59%
7	Belgium	9,018,187	21,314,542	18,018,883	99.81%
8	Brazil	5,750,664	10,991,137	17,251,692	199.99%
9	United Kingdom	11,208,922	12,398,212	12,838,021	14.53%
10	Spain	5,385,362	6,972,474	12,717,653	136.15%
11	Turkey	21,768,610	7,243,254	11,840,524	-45.61%
12	Vietnam	1,747,384	6,379,378	11,128,425	536.86%
13	France	6,349,379	8,828,885	10,944,690	72.37%
14	Canada	6,794,724	8,594,318	9,164,736	34.88%
15	Indonesia	711,920	1,691,806	7,739,549	987.14%
16	Jordan	1,073,595	10,379,988	7,152,416	566.21%
17	India	4,827,282	5,610,742	7,075,294	46.57%
18	Switzerland	4,643,496	5,535,668	6,434,840	38.58%
19	Australia	3,978,764	5,455,904	5,399,980	35.72%
20	Denmark	4,531,056	4,965,987	5,256,661	16.01%

1.7. Major Export Countries and Regions Market Share for Chinese Electric Vehicle (HS:87119010)

NO.	Export Countries/ Regions	Export Value (%)		
		2010	2011	2012
1	Netherlands ↓	21.52%	14.33%	14.20%
2	Germany	10.37%	12.68%	10.85%
3	USA ↓	14.03%	10.58%	9.80%
4	Italy ↑	2.93%	4.46%	6.33%
5	Bangladesh ↓	12.67%	8.22%	5.76%
6	Japan	5.16%	4.42%	4.85%
7	Belgium	2.29%	5.29%	4.23%
8	Brazil ↑	1.46%	2.73%	4.05%
9	United Kingdom	2.84%	3.08%	3.01%
10	Spain ↑	1.37%	1.73%	2.99%
11	Turkey	5.52%	1.80%	2.78%
12	Vietnam ↑	0.44%	1.58%	2.61%
13	France ↑	1.61%	2.19%	2.57%
14	Canada ↑	1.72%	2.13%	2.15%
15	Indonesia ↑	0.18%	0.42%	1.82%
16	Jordan	0.27%	2.58%	1.68%
17	India ↑	1.22%	1.39%	1.66%
18	Switzerland ↑	1.18%	1.37%	1.51%
19	Australia	1.01%	1.35%	1.27%
20	Denmark ↑	1.15%	1.23%	1.23%

Note: ↑ represents the amount of exports to the country in 2009-2011 accounted for the proportion of China's total exports continued to rise. ↓ represents the amount of exports to the country in 2009-2011 accounted for the proportion of Chinese total exports continued to decline.

According to Chinese electric vehicle exports statistics, China's main export countries are Netherlands, Germany, USA, Italy, Bangladesh, Japan, Belgium, Brazil, United Kingdom, Spain, Turkey, Vietnam, France, Canada, Indonesia, Jordan, India, Switzerland, Australia and Denmark. Among the countries, the growth rate to Italy, Brazil, Spain, Vietnam, Indonesia and Jordan in 2011 is greater than in 2010, respectively increased 133.10%, 199.99%, 136.15%, 536.86%, 987.14% and 566.21%.

The countries to which the market share continued to rise in three years are: Italy, Brazil, Spain, Vietnam, France, Canada, Indonesia, India, Switzerland and Denmark.

2. Electric Vehicle Industry Export Analysis from Jan. to Dec. in 2012

2.1. Chinese Electric Vehicle (HS:87119010) Export volume and value from Jan. to Dec. in 2012

Month	Quantity (units)	Amount (USD)	Volume compared to the same period of last year	Value compared to the same period of last year
Jan.	87,968	35,167,998	-16.0%	2.1%
Feb.	51,256	19,640,411	-33.4%	-27.3%
Mar.	95,088	37,023,577	-36.8%	-1.1%
Apr.	113,053	46,186,819	-20.0%	13.6%
May.	112,479	45,120,429	-22.7%	6.6%
Jun.	110,451	39,687,018	-2.8%	7.3%
Jul.	125,430	38,719,316	18.9%	1.7%
Aug.	124,377	39,165,230	15.7%	17.0%
Sep.	151,757	35,922,628	12.6%	22.8%
Oct.	130,484	29,045,645	-5.7%	2.4%
Nov.	97,807	25,735,681	-4.8%	-3.7%
Dec.	88,621	34,399,387	-0.9%	22.3%
Jan. To Dec. Total	1,288,771	425,814,139	-8.6%	5.7%

2.2. Major Export Countries / Regions for Chinese Electric Vehicle (HS:87119010) from Jan. to Dec. in 2012 (Sort by export value)

Countries/Regions	Export Value (USD)	Year on year	Account
Total	425,814,139	-8.6%	100.00%
Netherlands	60,455,947	4.7%	14.20%
Germany	46,186,229	-9.5%	10.85%
USA	41,731,932	-2.1%	9.80%
Italy	26,943,733	50.1%	6.33%
Bangladesh	24,518,081	-26.0%	5.76%
Japan	20,650,936	15.9%	4.85%
Belgium	18,018,883	-15.5%	4.23%
Brazil	17,251,692	57.0%	4.05%
United Kingdom	12,838,021	3.5%	3.01%
Spain	12,717,653	82.4%	2.99%

2.3. Chinese Electric Vehicle (HS:87119010) export enterprises distribution from Jan. to Dec. in 2012 (Sort by export value)

Regions	Total Export Value from Jan. to Dec. (USD)	Account
Jiangsu	168,811,479	39.64%
Zhejiang	129,703,693	30.46%
Guangdong	43,776,773	10.28%
Tianjin	31,947,048	7.50%
Hebei	19,770,637	4.64%

Netherlands was the largest export market for Chinese electric vehicle, accounting for 14.2% market share. Malaysia ranked second, accounting for 15.9%, followed by Germany and USA, accounting for 10.85% and 9.8% respectively.

Chinese electric vehicle industry export enterprises are mainly distributed in Jiangsu, Zhejiang and Guangdong from Jan. to Dec. in 2012, accounting for 39.64%, 30.46% and 10.28% respectively.

Source: Customs Information Network

3. Global Electric Vehicle Industry Requirements Analysis

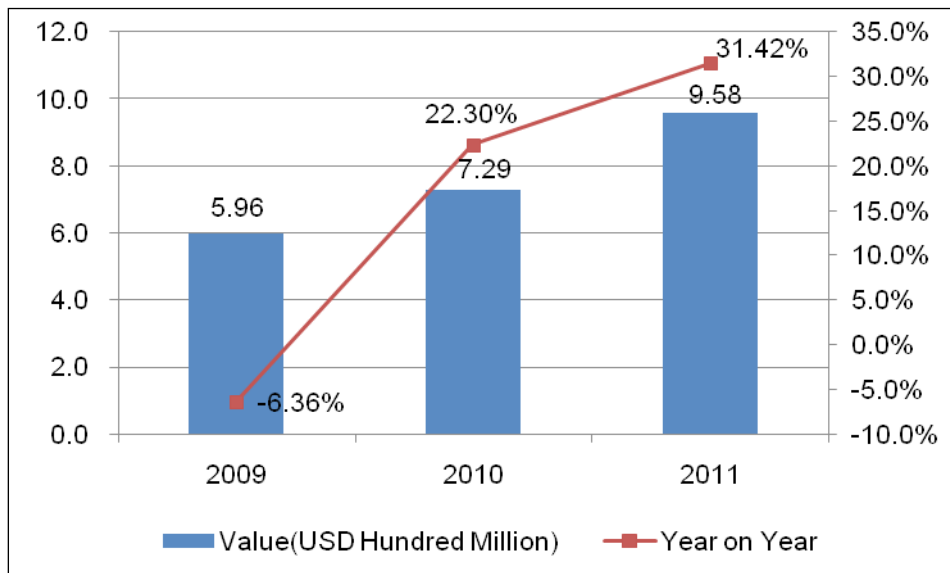
Note:

HS: 871190

Electric motorcycles, electric power bikes, nes motorcycles and bicycles equipped with auxiliary power; sidecar, hereinafter referred to as "electric vehicle"

3.1. Global Demand for Electric Vehicle (HS: 871190) Requirements analysis

3.1.1. Global Demand for Electric Vehicle (HS: 871190) Requirements Trend from 2009 to 2011



3.1.2. Major Demand Countries / Regions for Electric Vehicle (HS: 871190) in 2012

NO.	Import Countries/Regions	Import Value (Thousand USD)	Over the same period of last year
1	Germany	200,074	16.20%
2	Philippines	158,618	-25.55%
3	Netherlands	108,589	39.53%
4	Switzerland	75,293	29.78%
5	USA	40,181	32.94%
6	Belgium	36,074	-16.69%
7	France	35,661	36.57%
8	Italy	26,688	34.99%
9	Austria	24,175	-8.91%
10	Japan	22,390	2.47%
11	Canada	17,419	-6.33%
12	United Kingdom	11,763	-26.37%
13	Spain	11,254	2.68%
14	Sweden	8,352	-7.58%
15	Turkey	7,497	35.64%
16	Denmark	7,402	-45.83%
17	Brazil	6,786	28.40%
18	Czech Republic	5,717	9.44%
19	Australia	5,626	-21.06%
20	Thailand	5,057	66.13%

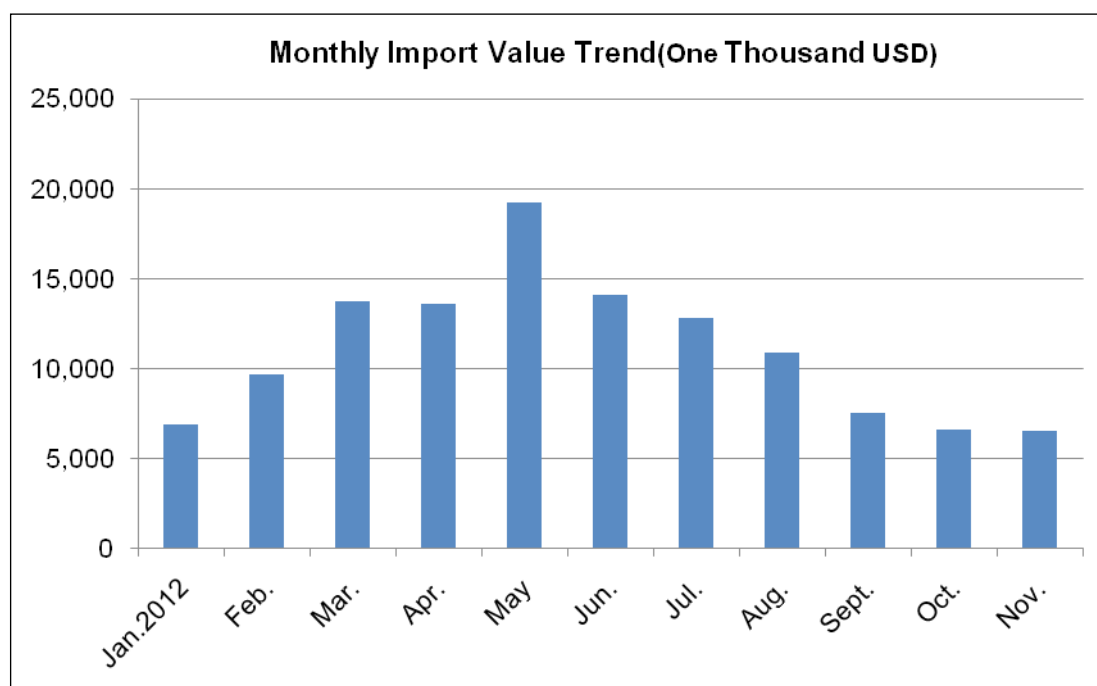
Global demand for electric vehicles continued to rise from 2009 to 2011. The global electric vehicle imports amounted to \$ 960 million in 2011, with an increase of 31.42% year on year.

The main demand for electric vehicles countries are Germany, the Philippines, Netherlands, Switzerland, USA, Belgium, France, Italy, Austria, Japan, Canada, United Kingdom, Spain, Sweden, Turkey, Denmark, Brazil, Czech Republic, Australia and Thailand in 2012. Among them, the countries whose amount of imports in 2011 year on year growth of more than twenty percent are Netherlands, Switzerland, USA, France, Italy, Turkey, Brazil and Thailand.

3.2. Major Demand Market Analysis for Electric Vehicle (HS: 871190) Industry

3.2.1. Requirements Analysis of Netherlands for Electric Vehicle (HS: 871190)

- Monthly Trend of Netherlands Import Value of Electric Vehicle from Jan. to Nov.2012



- Electric Vehicle Major Importing Countries/Regions of Netherlands from Jan. to Nov.2012

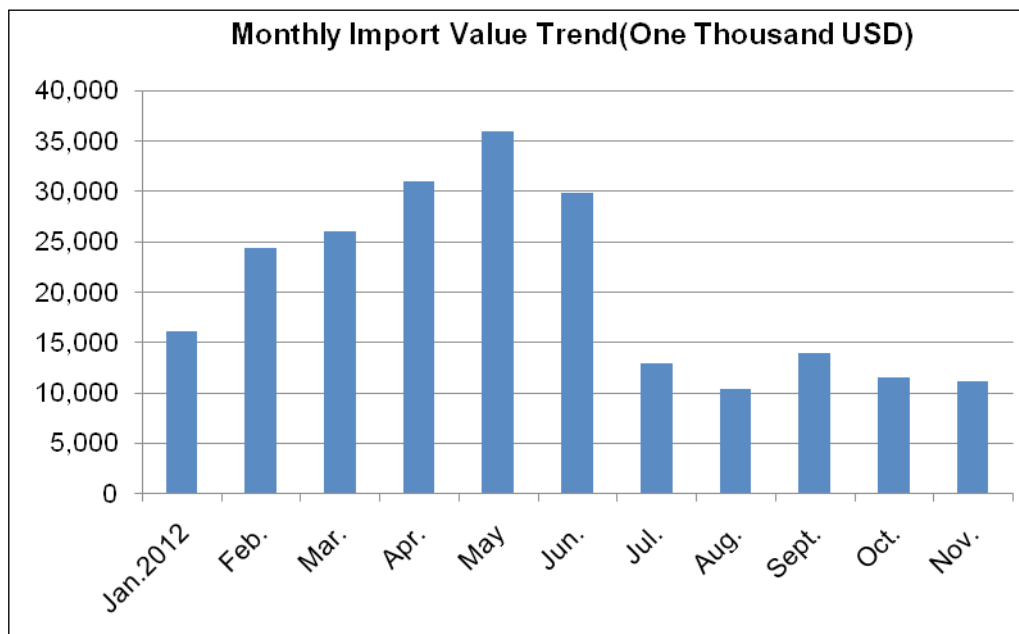
NO.	Import Countries/Regions	Import Value (Thousand USD)	Account
1	China	58,866	48.34%
2	Germany	32,509	26.70%
3	Japan	15,016	12.33%
4	Belgium	5,518	4.53%
5	USA	2,527	2.08%
6	Czech Republic	2,348	1.93%
7	Taiwan	1,661	1.36%
8	France	1,545	1.27%
9	Denmark	1,068	0.88%
10	Spain	245	0.20%

Main import sources of electric vehicles for Netherlands are: China, Germany, Japan, Belgium, USA, Czech Republic, Taiwan, France, Denmark and Spain from Jan. to Nov. in 2012. Among them, China is the country of their primary imports sources. The cumulative amount of imports from China was 58.866 million USD from Jan. To Nov., accounting for 48.34% of total imports, nearly half; followed by Germany and Japan, accounting for 26.7% and 12.33 % of the market share.

It can be seen from the amount of monthly imports trend that imports in May was the highest from Jan. to Nov. in 2012.

3.2.2. Requirements Analysis of Germany for Electric Vehicle (HS: 871190)

- Monthly Trend of Germany Import Value of Electric Vehicle from Jan. to Nov.2012



- Electric Vehicle Major Importing Countries/Regions of Germany from Jan. to Nov.2012

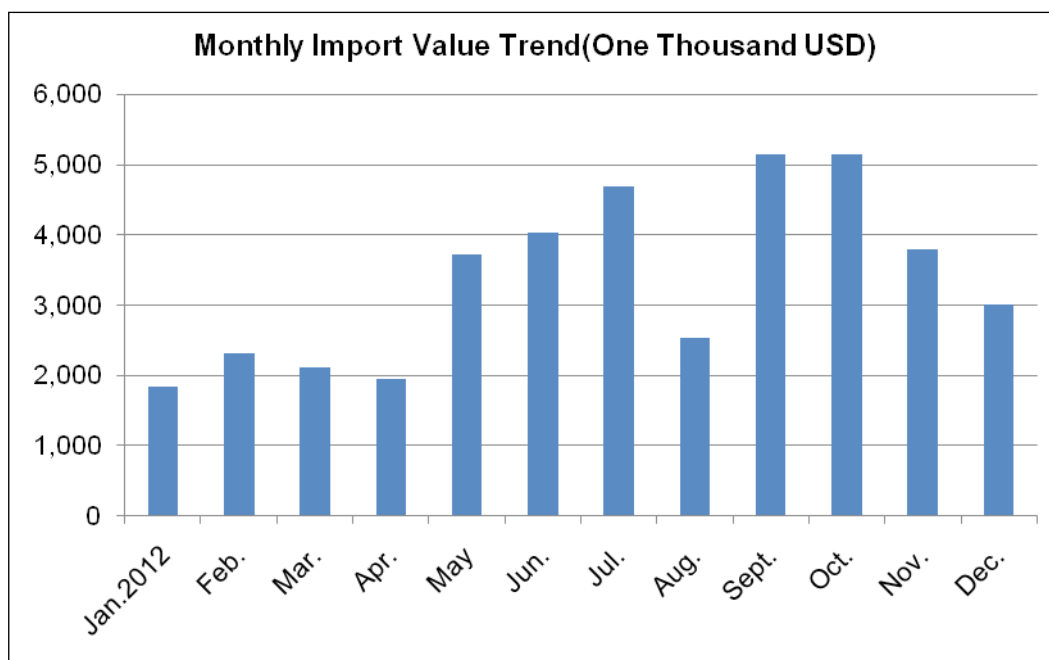
NO.	Import Countries/Regions	Import Value (Thousand USD)	Account
1	China	48,766	21.91%
2	Japan	45,498	20.44%
3	Netherlands	33,308	14.97%
4	Hungary	28,469	12.79%
5	Austria	26,124	11.74%
6	Vietnam	15,527	6.98%
7	Taiwan	7,942	3.57%
8	France	6,066	2.73%
9	Belgium	4,973	2.23%
10	Czech Republic	3,829	1.72%

Main import sources of electric vehicles for Germany are: China, Japan, Netherlands, Hungary, Austria, Vietnam, Taiwan, France, Belgium and the Czech Republic from Jan. to Nov. in 2012. Among them, China is the country of their primary imports sources. The cumulative amount of imports from China was 48.766 million USD from Jan. To Nov., accounting for 21.91% of total imports; followed by Japan and Netherlands, accounting for 20.44% and 14.97 % of the market share.

It can be seen from the amount of monthly imports trend that demand in the second half year was significantly lower than the first half from Jan. to Nov. in 2012.

3.2.3. Requirements Analysis of USA for Electric Vehicle (HS: 871190)

- Monthly Trend of USA Import Value of Electric Vehicle from Jan. to Nov.2012



- Electric Vehicle Major Importing Countries/Regions of USA from Jan. to Nov.2012

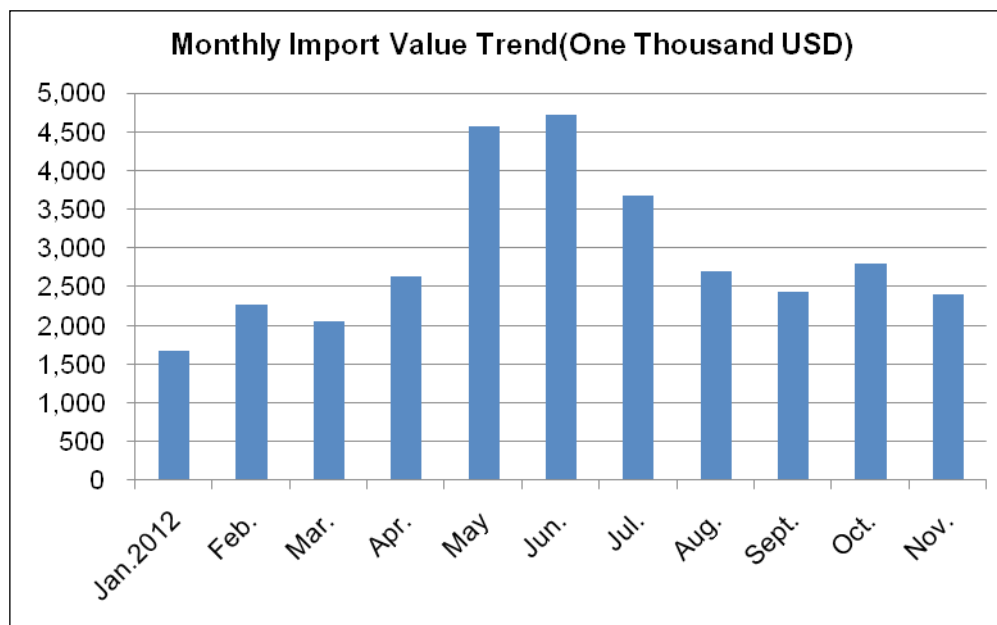
NO.	Import Countries/Regions	Import Value (Thousand USD)	Account
1	China	33,350	83.00%
2	Taiwan	3,930	9.78%
3	Mexico	643	1.60%
4	Hungary	438	1.09%
5	Germany	419	1.04%
6	Australia	328	0.82%
7	Spain	266	0.66%
8	India	242	0.60%
9	Poland	192	0.48%
10	Netherlands	99	0.25%

Main import sources of electric vehicles for USA are: China, Taiwan, Mexico, Hungary, Germany, Australia, Spain, India, Poland and Netherlands from Jan. to Dec. in 2012. Among them, China is the country of their primary imports sources. The cumulative amount of imports from China was 33.35 million USD from Jan. To Dec., accounting for 83% of total imports, with a large market share and obvious competitive advantage.

It can be seen from the amount of monthly imports trend that demand in the second half year was higher than in the first half from Jan. to Dec. in 2012.

3.2.4. Requirements Analysis of Italy for Electric Vehicle (HS: 871190)

- Monthly Trend of Italy Import Value of Electric Vehicle from Jan. to Nov.2012



- Electric Vehicle Major Importing Countries/Regions of Italy from Jan. to Nov.2012

NO.	Import Countries/Regions	Import Value (Thousand USD)	Account
1	China	24,233	75.97%
2	United Kingdom	1,564	4.90%
3	Belgium	1,422	4.46%
4	Germany	1,415	4.44%
5	France	1,031	3.23%
6	USA	702	2.20%
7	Netherlands	484	1.52%
8	Switzerland	313	0.98%
9	Poland	304	0.95%
10	Taiwan	147	0.46%

Main import sources of electric vehicles for Italy are: China, United Kingdom, Belgium, Germany, France, USA, Netherlands, Switzerland, Poland and Taiwan from Jan. to Nov. in 2012. Among them, China is the country of their primary imports sources. The cumulative amount of imports from China was 24.233 million USD from Jan. to Dec., accounting for 75.97% of total imports, with a comparatively large market share.

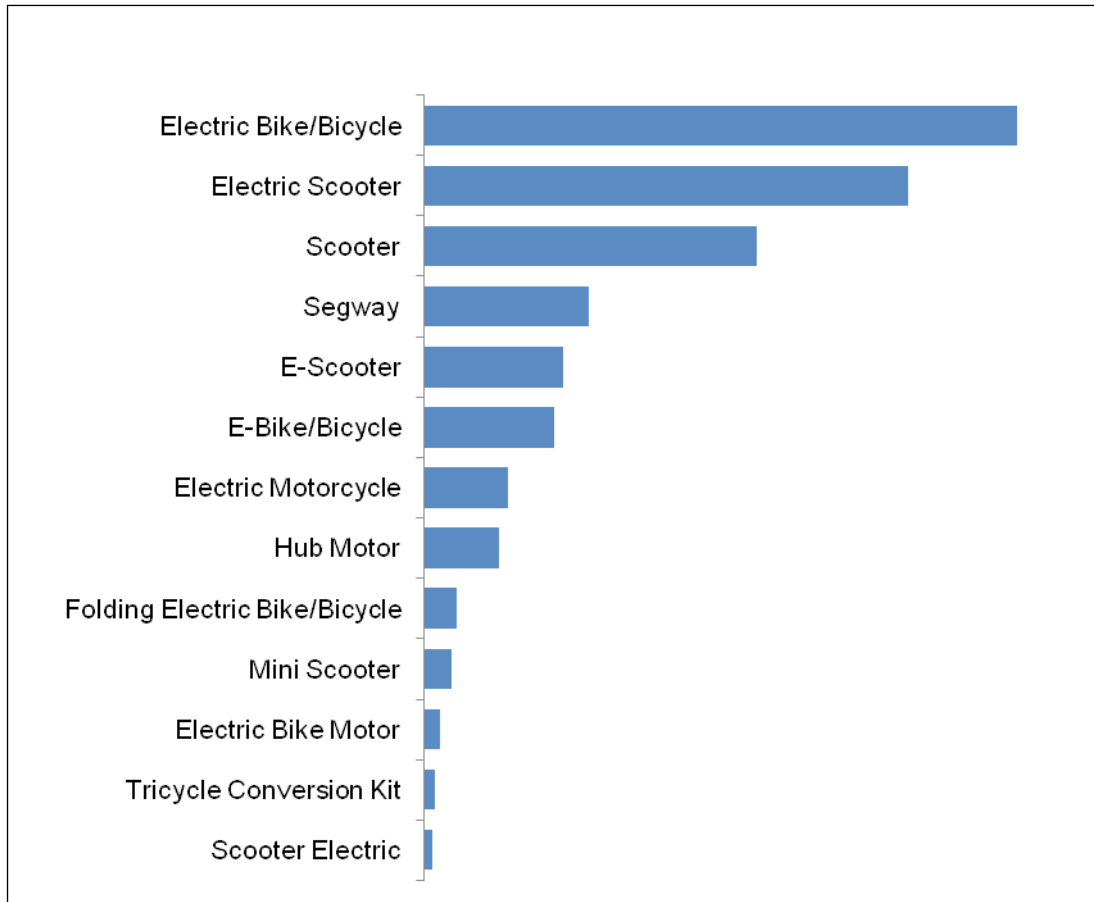
It can be seen from the amount of monthly imports trend that May, June and July were the comparatively larger months of imports from Jan. to Nov. in 2012.

Source: UN COMTRADE

4. Electric Vehicle Industry Data Analysis on Made-in-China.com

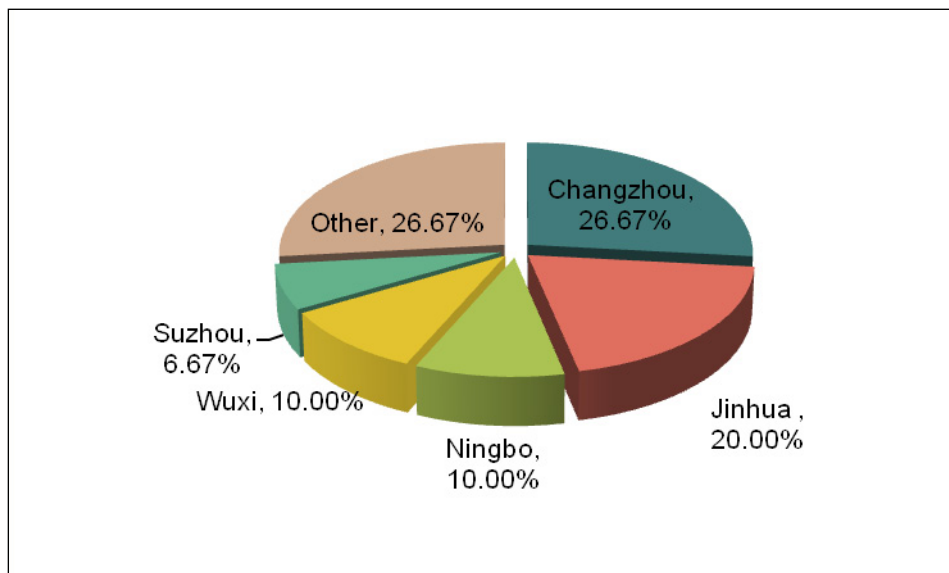
4.1. Hot Keywords of Electric Vehicle Industry on Made-in-China.com

The following statistics dated from Dec. 2012 to Feb. 2013



According to statistics, hot searching keywords of electric vehicle industry on Made-in-China.com from Dec. 2012 to Feb. 2013 are: Electric Bike/Bicycle, Electric Scooter, Scooter, Segway, E-Scooter, E-Bike/Bicycle, Electric Motorcycle, Hub Motor, Folding Electric Bike/Bicycle and Mini Scooter.

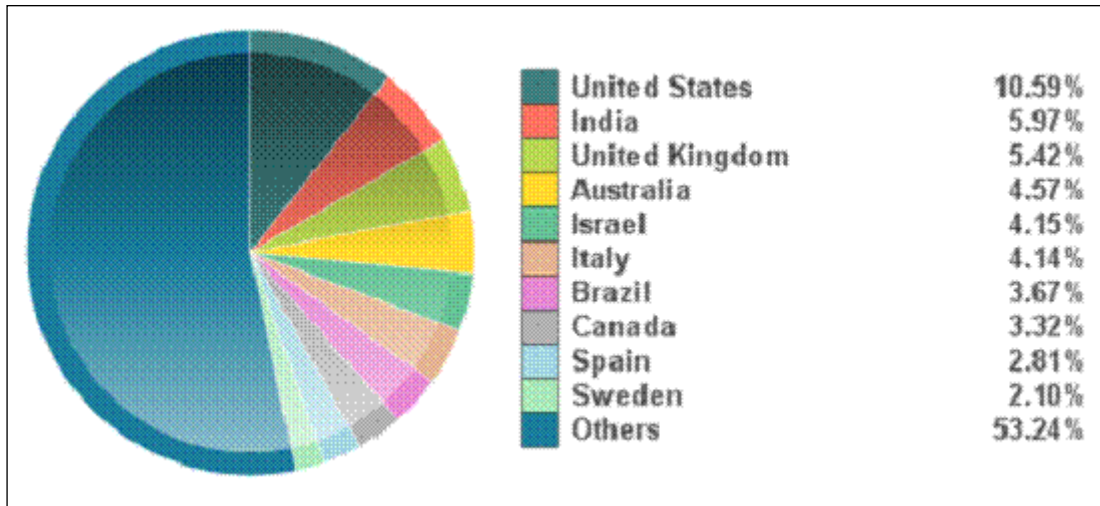
4.2. Premium Suppliers Distribution of Electric Vehicle Industry on Made-in-China.com in 2012



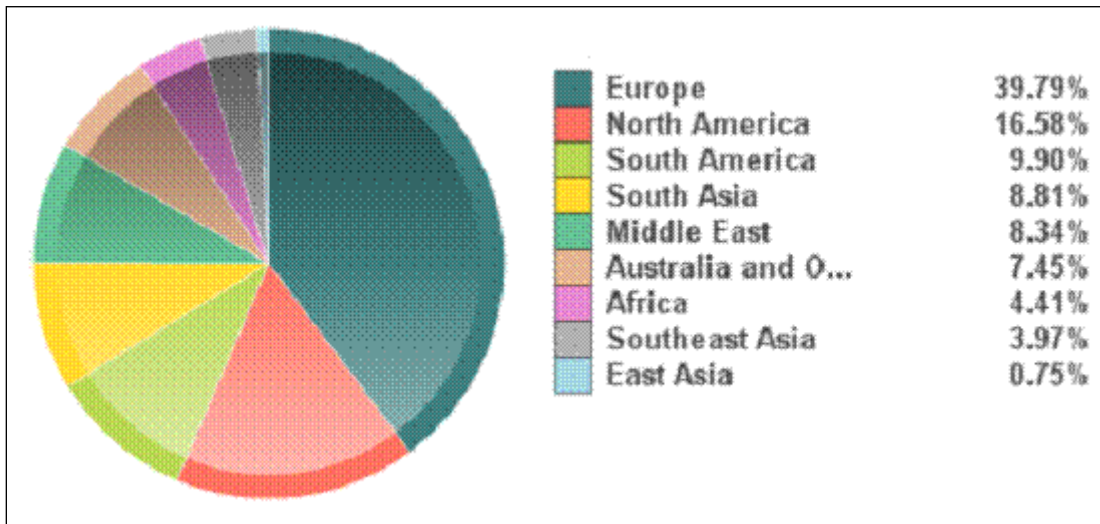
Premium Suppliers of electric vehicle industry in 2012 are mainly distributed in Changzhou, Jinhua, Ningbo and Wuxi on Made-in-China.com.

4.3. Buyer Distribution (by inquiry) of Electric Vehicle Industry on Made-in-China.com in 2012

By Countries:

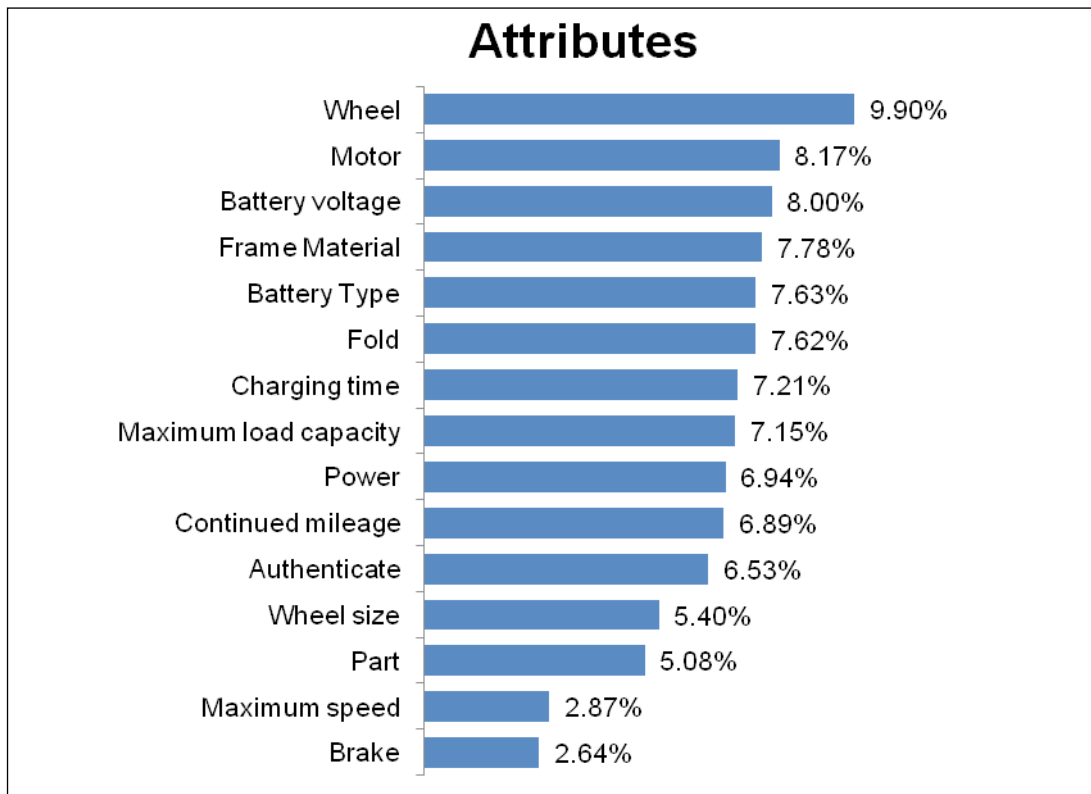


By Continents:



Buyers of electric vehicle industry in 2012 are mainly distributed in USA, India and United Kingdom and so on; Mainly in Europe and North America continents.

4.4. Attention Ranking of Electric Vehicle Industry on Made-in-China.com in 2012



Source: Made-in-China.com

The IAR Team of Made-in-China.com dedicates to surveying,excavating and collating industry information for supplying the service of timely and exact information analysis, providing necessary information and dates for clients'decision.

Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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Web: <http://www.made-in-china.com/communication/market-analysis.html>



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