

# Finished Vehicle Exports from China

## Q1 2023

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### By Volume & Value



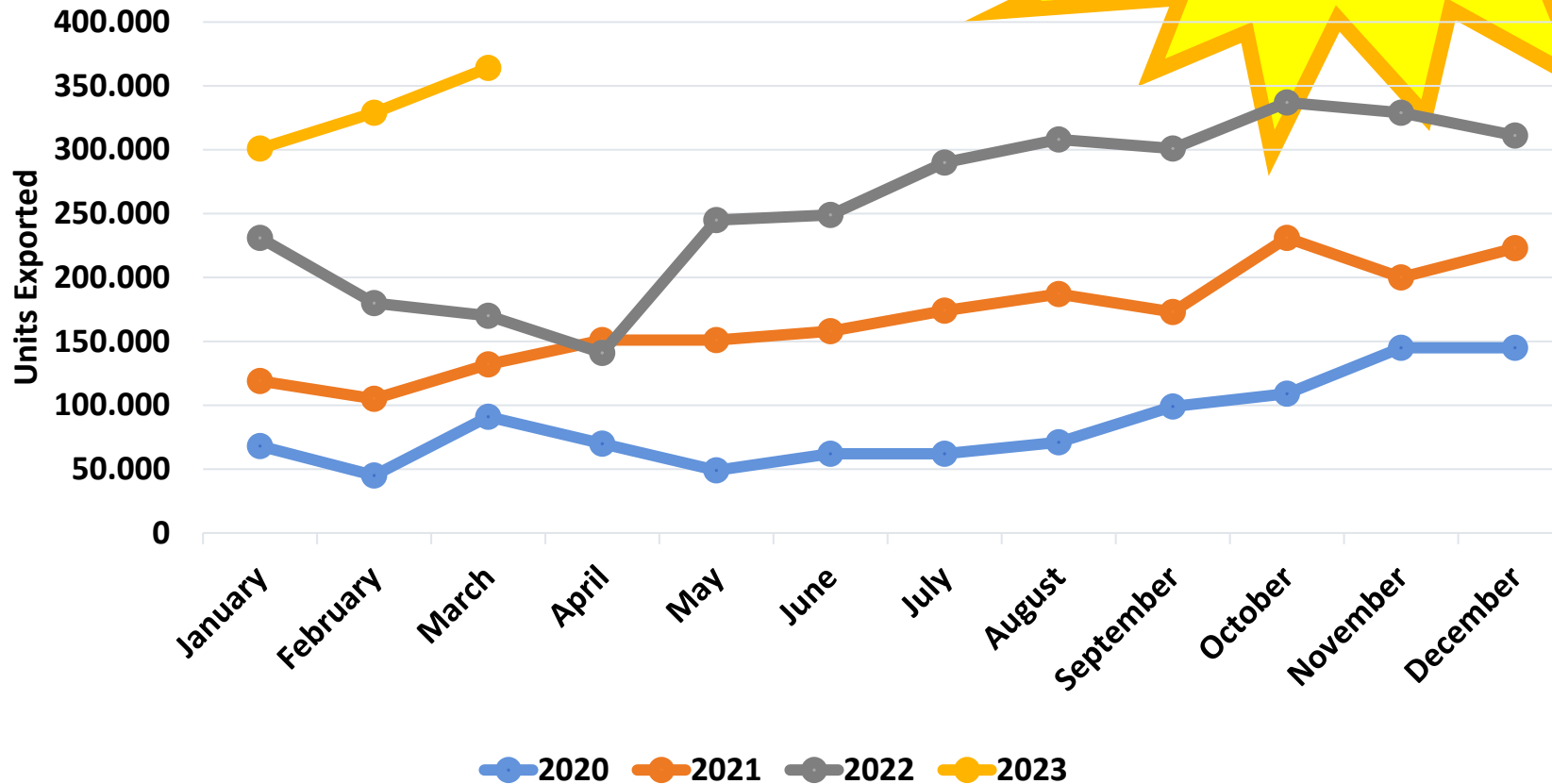


**Full Year 2022  
Q1 2023**

# Volume of Chinese PV Exports

# Finished Vehicle Exports from China

Vehicle Exports from China, by Volume



**Q1 EXPORTS**  
994,000 units!

**Q1 exports up**  
71% y/y!

**Q1 2023 Vehicle Exports from CHINA: 994,000 units**

**Full Year 2022 Vehicle Exports: 3,092,100 units**

**Full Year 2021 Vehicle Exports: 2,015,000 units**

**Full Year 2020 Vehicle Exports: 995,000 units**

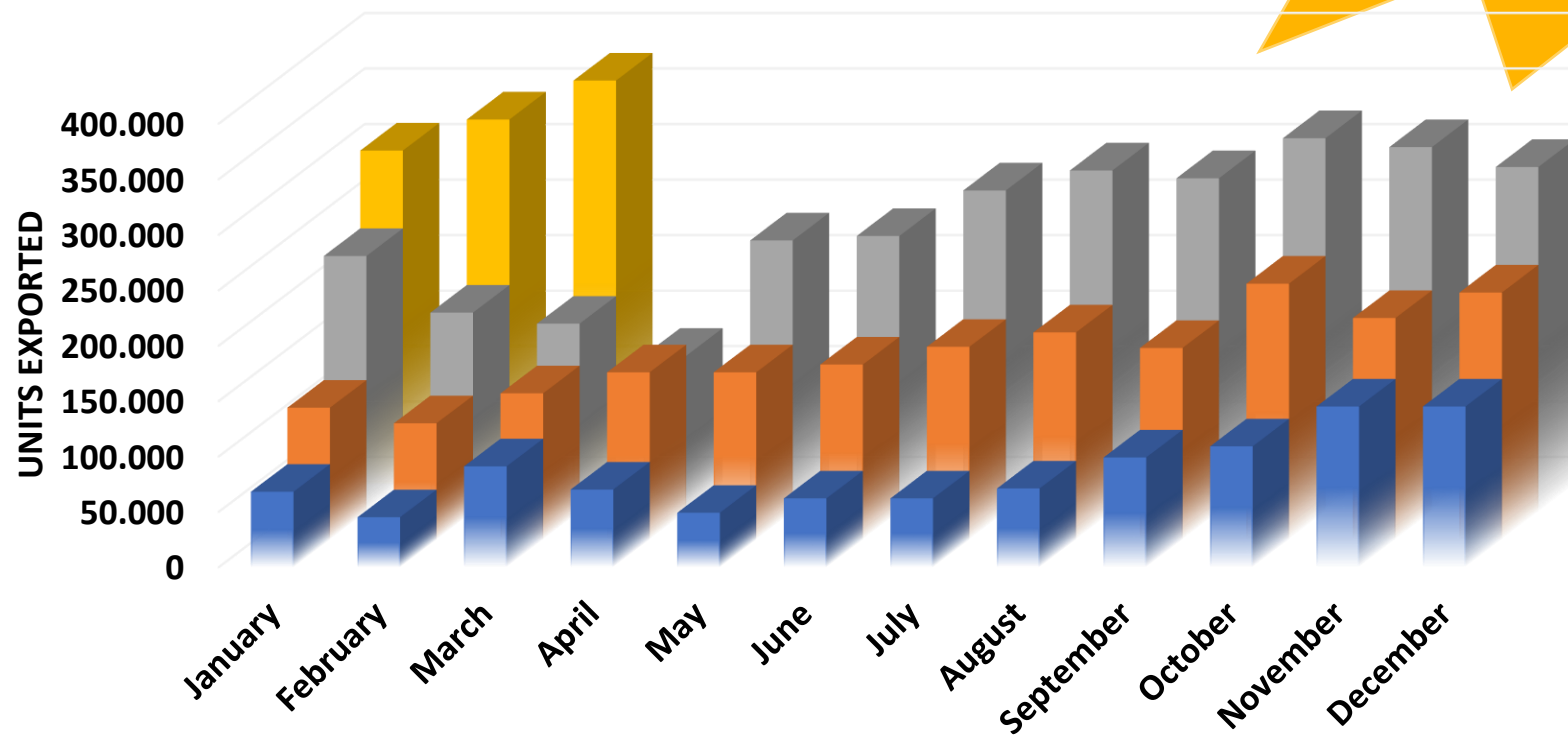
Source: ECG Business Intelligence, CAAM data

\* Rounding may occur

# Chinese Vehicle Exports

FINISHED VEHICLE EXPORTS FROM CHINA

Monthly Export Volumes  
now over 364,000 units!



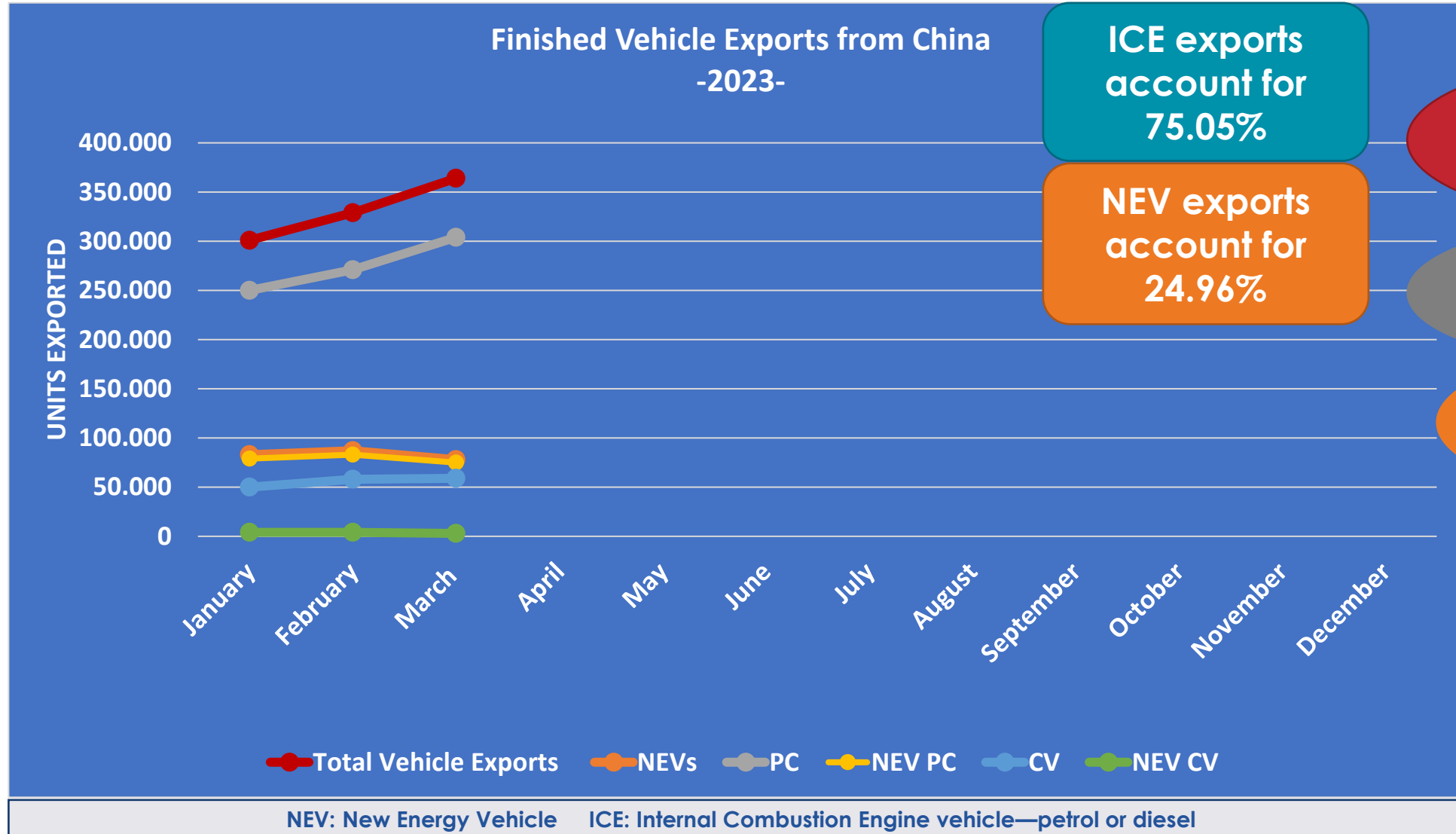
	2020	2021	2022	2023
Jan	68,000	119,000	231,000	301,000
Feb	45,000	105,000	180,000	329,000
Mar	91,000	132,000	170,000	364,000
Apr	70,000	151,000	141,000	
May	49,000	151,000	245,000	
Jun	62,000	158,000	249,000	
Jul	62,000	174,000	290,000	
Aug	71,000	187,000	308,000	
Sep	99,000	173,000	301,000	
Oct	109,000	231,000	337,000	
Nov	145,000	200,000	329,000	
Dec	145,000	223,000	311,100	



Source: ECG Business Intelligence, CAAM data

\* Rounding may occur

# Exports by Type: Q1 2023



ICE exports account for 75.05%

NEV exports account for 24.96%

Total Vehicles Exported Q1 994,000, UP 70%

Passenger Vehicles Q1 825,000, UP 28%

Total NEVs YTD 248,000

NEV Passenger vehicles 237,000

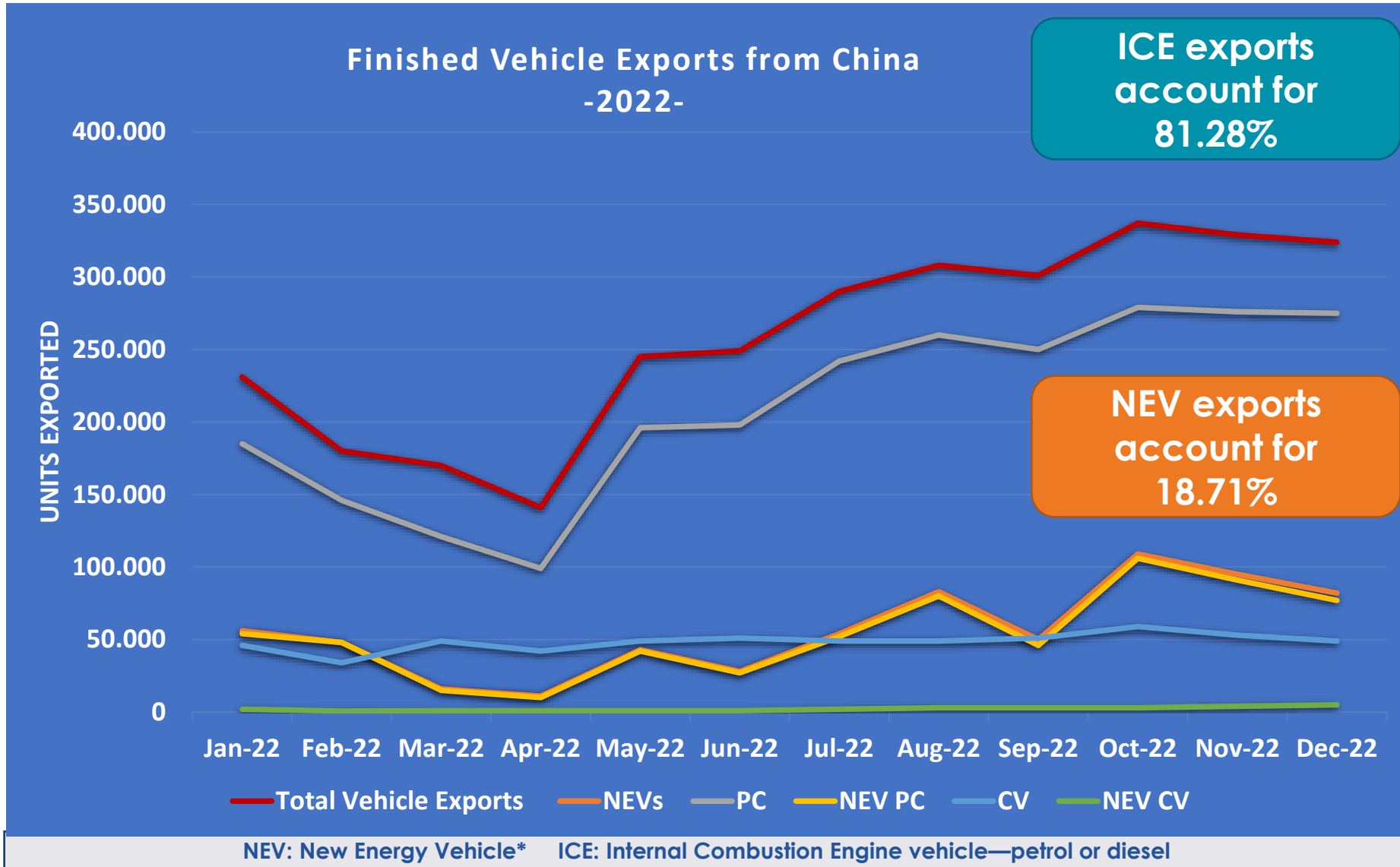
Commercial Vehicles 167,000

NEV CV 11,000

NEV: Battery Electric Vehicle, Plug in Hybrid, Fuel Cell Vehicle

Source: ECG Business Intelligence, CAAM data

# Exports by type – Full Year 2022



\* Battery Electric Vehicle, Plug in Hybrid, Fuel Cell Vehicle

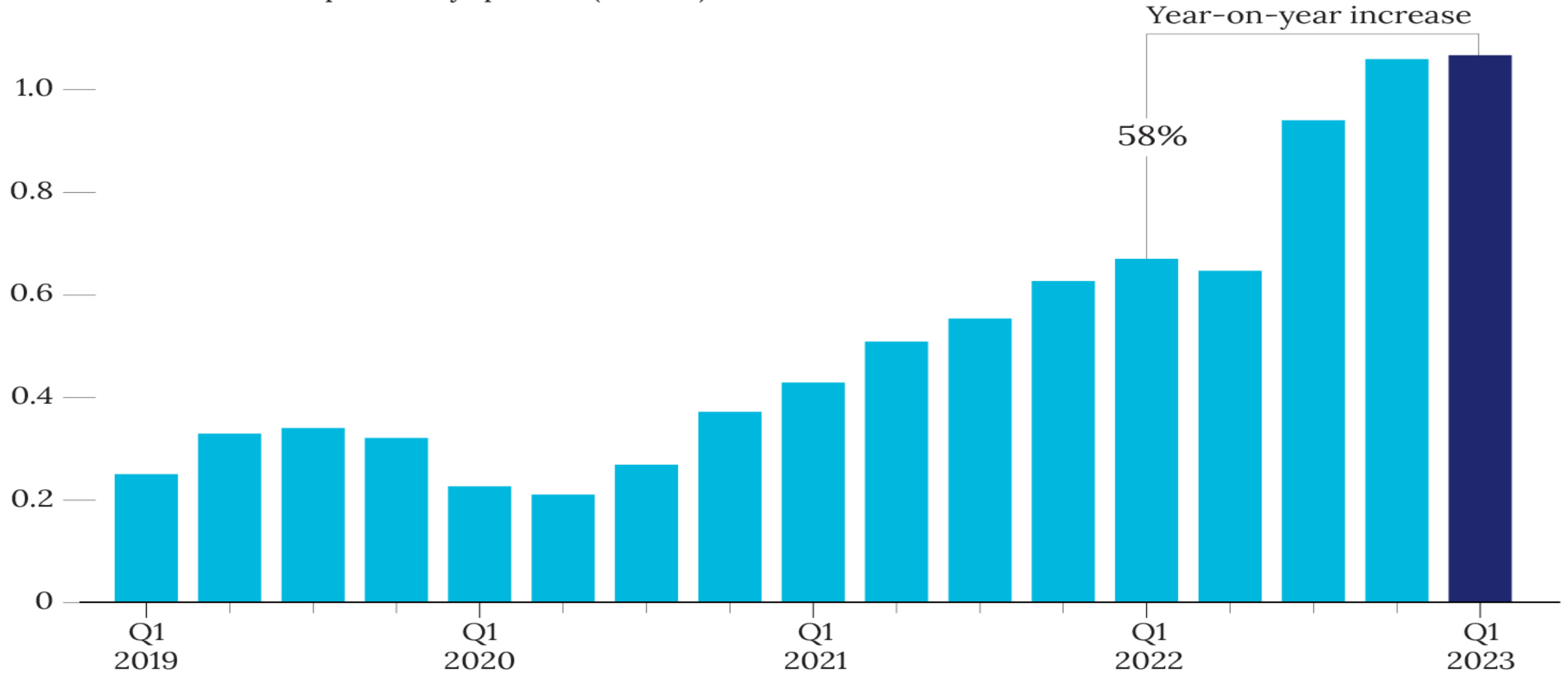
- Total Vehicles Exported 3.09 mil
- Passenger Vehicles 2.52 million
- Total NEVs 675,000
- NEV Passenger vehicles 648,000
- Commercial Vehicles 581,000
- NEV CV 26,700

Source: ECG Business Intelligence, CAAM data

# China's Auto Exports Surge

Number of vehicles exported by quarter (million)

According to China Customs Data, vehicle export volume has hit 1.07 million units in Q1\* 2023



Source: General Administration of Customs

\* China Customs & CAAM use different monthly reporting cycles (ie start mid month, vs start first of month)

Caixin

# And Chinese brands gain in Russia



## Russians reluctantly embrace Chinese cars after Western brands depart

Automotive News Europe

Chinese brands such as Haval, Chery and Geely now account for almost 40 percent of Russia's new-car sales, up from less than 10 percent in January-February of 2022.

March 24, 2023

## Chinese Cars Rise in Russia After Fury Drove Western Brands Out

Chery, Geely, Great Wall fill void left by global automakers

Chinese Association of Automobile Manufacturers Starts Operations in Russia | March 6, 2023



## Chinese cars, phones gain ground in Russia's sanctions-hit economy

3 Chinese auto brands grab 16% of shrinking market as global carmakers exit

## 100 Chinese car brands may enter the Russian market in 2023

March 3, 2023





# And to Mexico

MEXICONOW

4 January, 2023

## China is the main supplier of cars to Mexico

China is the largest supplier of cars to Mexico and that will not change this decade

February 12, 2023

Mexico Daily Post

## Chinese auto manufacturer Chery eyeing Mexico expansion, economy ministry says

REUTERS

At the first stage, the Chinese company will have a network of 40 dealerships around the country, located in Aguascalientes, Baja California, Guanajuato, Jalisco, Nuevo Leon, Puebla, San Luis Potosi and other states. By 2030, the company aims to have over 100 dealerships in Mexico and will also invest in its own plant. "By 2026, we will have our assembly plant in Mexico," said Guibing.

MEXICO BUSINESS NEWS

SAIC MGs set sail for Mexico

2023-03-20



CHINADAILY.COM.CN

International Terminal of Wuhu Port



# Other China Export news

International OEMs use China as base for shipping to home countries, developed markets



## Ford Forges New Link to China With Plan to Import Lincoln SUVs

18 April 2023 **Bloomberg**

- Restyled Nautilus to be first model Ford ships home from China

## Honda to export China-made vehicles to Japan

2023-04-07 **CHINADAILY** 中国日报网

## Chinese automaker Chery plans to set up NEV plant in Argentina

Feb 19, 2023 **GT** Global Times

Automobiles at Taicang Port, ready for shipping to Greece, Spain, Italy ...Photo: VCG, March 2, 2023

**GT** Global Times

## VW to export China-made EVs to Europe

December 6, 2022 **CNEVPOST**

## Tesla Lifts China's New Energy Vehicle Exports to a Record

Jan 14, 2023



## VW will join Tesla and BMW in selling China-built EVs in Europe

December 02, 2022



视觉中国





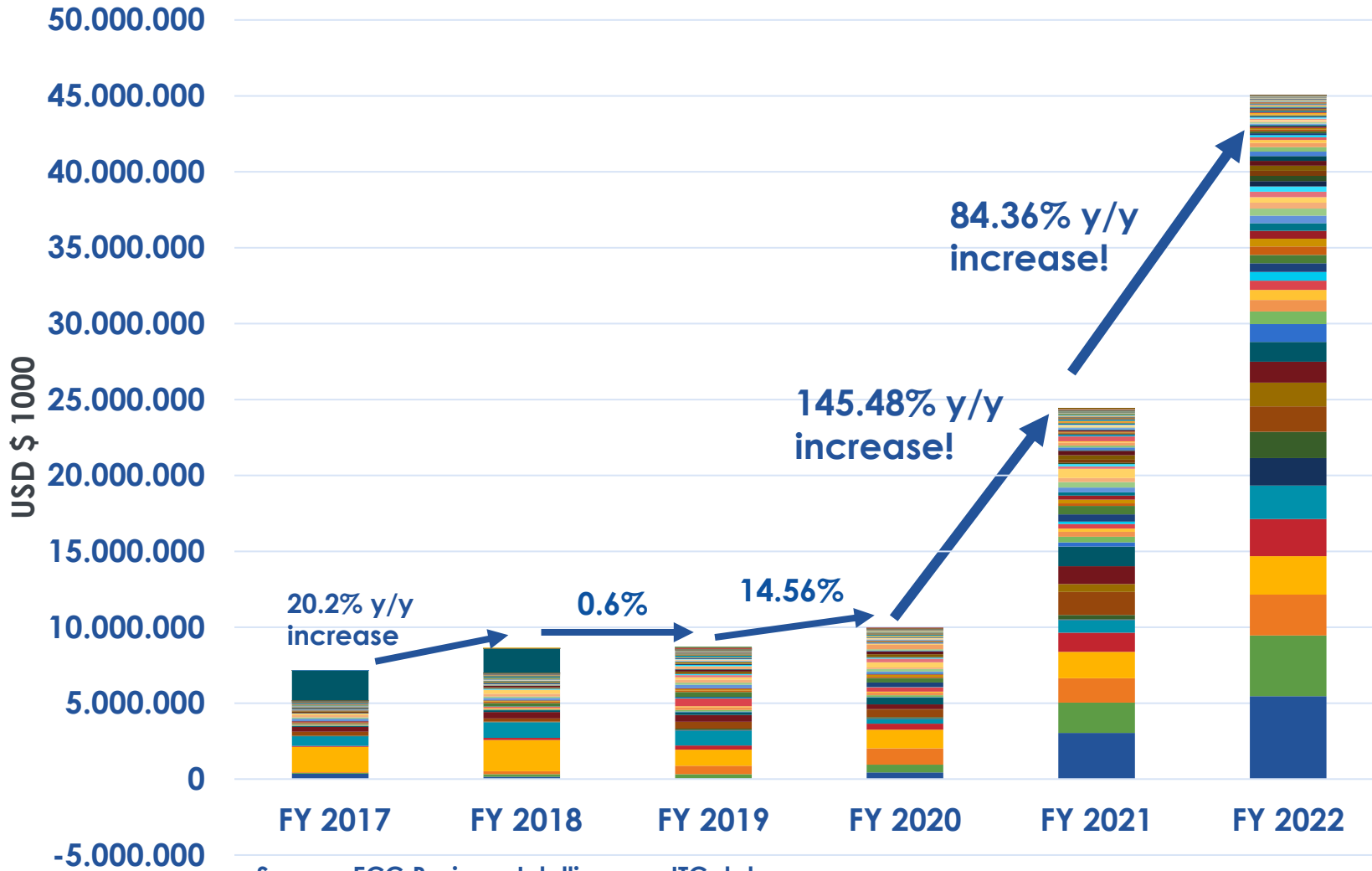
Full Year  
2022 Update!

# Value of Chinese PV Exports

Value of Chinese PV Exports & Destinations

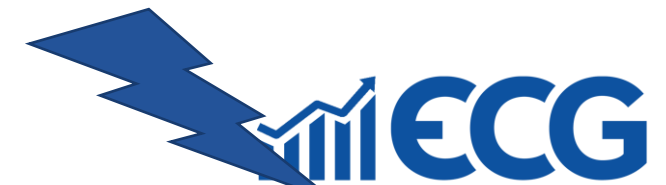


## Value of Chinese Passenger Vehicle Exports\*, Full Year 2017-2022



Source: ECG Business Intelligence, ITC data

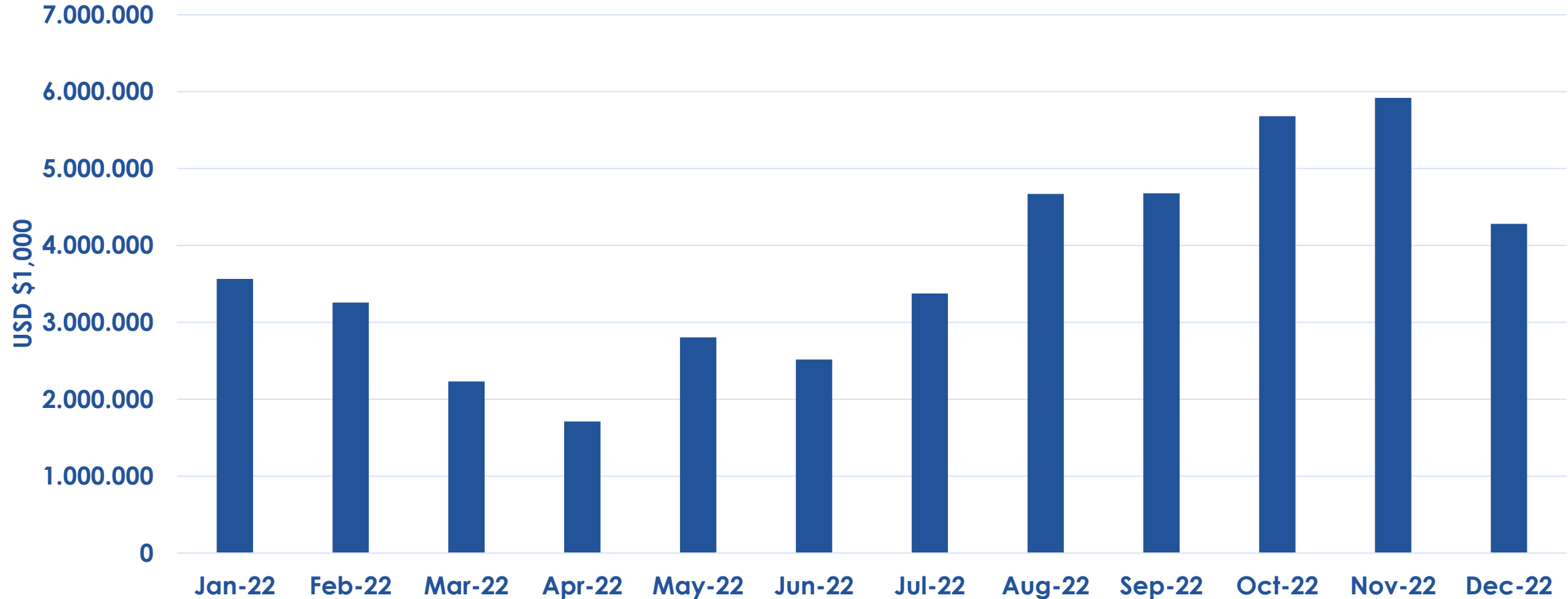
\* HS Code: 8703- Motor Vehicles for the transport of up to 10 persons



- Value of Chinese passenger vehicle exports rising
- 2020 to 2021 – 145.48% y/y increase to USD 24.43 bn
- 2021-2022 – 84.36% y/y increase to USD 45.04 bn

# Monthly passenger vehicle exports from China, by Value

## 2022



Source: ECG Business Intelligence, ITC data

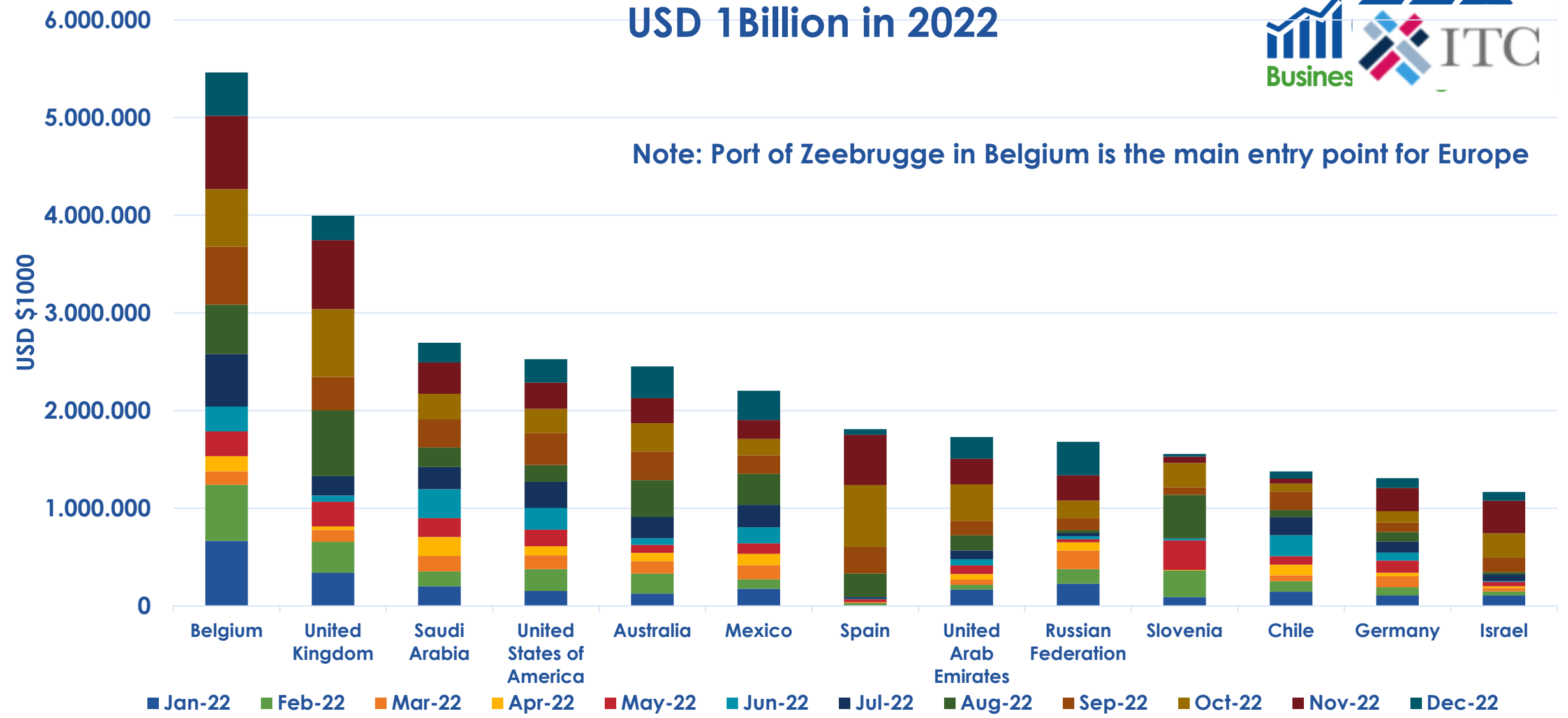
Product: 8703 Motor cars and other motor vehicles principally designed for the transport of up to 10 persons, incl. station wagons and racing cars (excluding motor vehicles of heading 8702 –for transport of over 10 persons)



# Chinese PV Exports by Value, Destinations with imports over USD 1 Billion in 2022

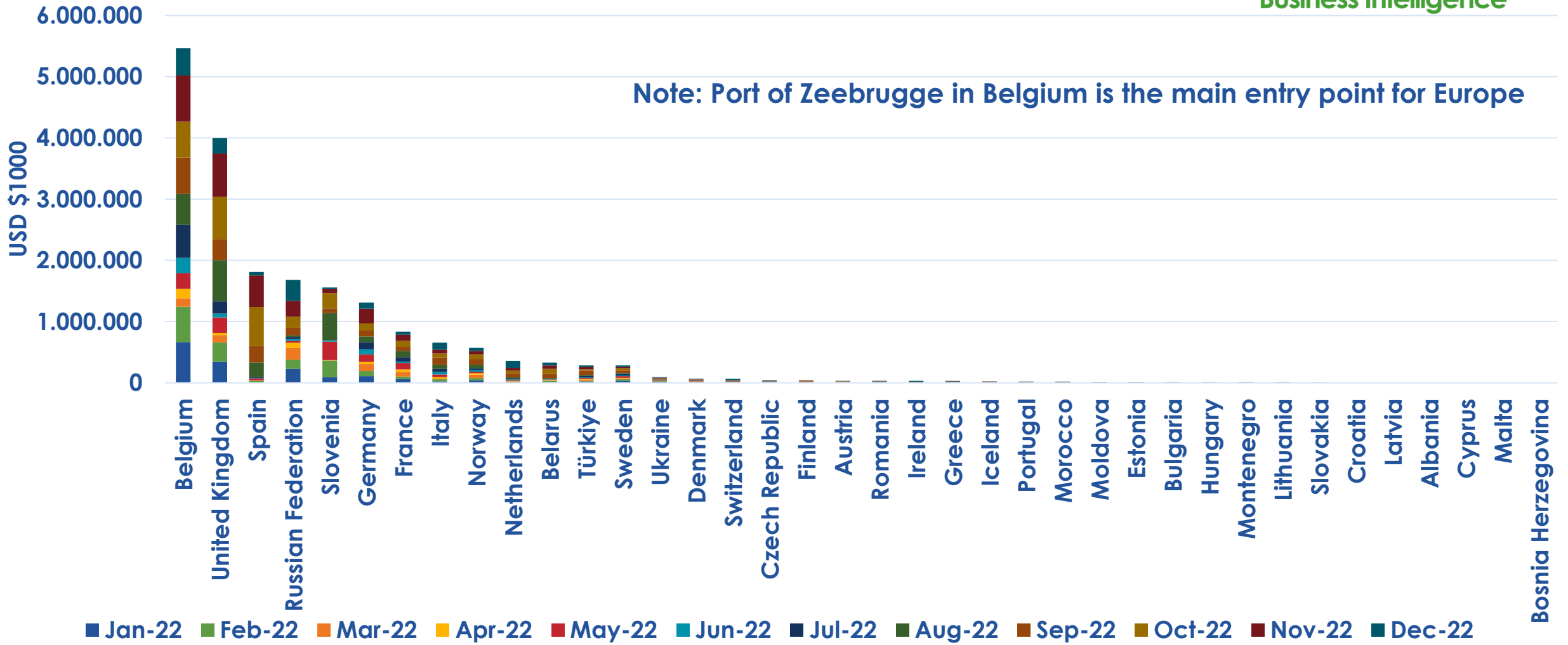


Note: Port of Zeebrugge in Belgium is the main entry point for Europe



Source: ECG Business Intelligence, ITC data

# Chinese PV Exports to Destinations in Europe, by Value, FY 2022



\* Including Russia, UK, Turkey

Source: ECG Business Intelligence, ITC data

# Top 15 Global Export Markets by Value (2022) for China built Passenger Vehicles

Unit : US Dollar thousand



Importers	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	Y/Y % Change 2018	Y/Y % Change 2019	Y/Y % Change 2020	Y/Y % Change 2021	Y/Y % Change 2022
Belgium	352,549	152,807	39,194	433,488	3,041,183	5,462,273	-56.66	-74.35	1,006.01	601.56	79.61
United Kingdom	55,318	167,137	283,133	511,481	1,990,969	3,995,102	202.14	69.40	80.65	289.26	100.66
Saudi Arabia	50,476	195,914	553,624	1,083,406	1,612,279	2,694,428	288.13	182.59	95.69	48.82	67.12
United States of America	1,665,858	2,056,069	1,062,203	1,223,899	1,738,452	2,526,684	23.42	-48.34	15.22	42.04	45.34
Australia	62,897	144,422	271,955	401,390	1,261,432	2,451,903	129.62	88.31	47.59	214.27	94.37
Mexico	630,940	1,017,749	977,294	306,466	830,563	2,203,444	61.31	-3.97	-68.64	171.01	165.30
Spain	4,510	10,255	48,749	41,285	39,999	1,810,417	127.38	375.37	-15.31	-3.11	4,426.16
United Arab Emirates	32,627	37,475	84,767	84,012	297,077	1,729,886	14.86	126.20	-0.89	253.61	482.30
Russian Federation	261,766	205,679	439,259	502,118	1,518,341	1,680,540	-21.43	113.57	14.31	202.39	10.68
Slovenia	3,721	5,018	11,663	12,983	512,344	1,556,932	34.86	132.42	11.32	3,846.27	203.88
Chile	317,301	423,115	448,092	323,223	1,174,418	1,377,782	33.35	5.90	-27.87	263.35	17.32
Germany	56,254	114,989	191,720	437,493	1,302,443	1,308,933	104.41	66.73	128.19	197.71	0.50
Israel	15,235	20,551	36,963	40,446	273,166	1,167,471	34.89	79.86	9.42	575.38	327.39
France	30,883	39,084	104,061	115,078	370,931	835,550	26.56	166.25	10.59	222.33	125.26
Philippines	24,138	88,520	178,933	178,194	324,498	760,296	266.72	102.14	-0.41	82.10	134.30



# New Brands in Europe



# New players disrupting vehicle sales in Europe\*

\*Europe - EU member countries & UK

Aiways U6 Goes On Sale In 6 European Countries With €45,500 Starting Price

 CarNewsChina

XPeng Enters 4 European Countries

 CleanTechnica

**BYD will launch sales of Atto 3 EV in UK this month**

March 09, 2023

 Automotive News Europe

Geely's EV brand Zeekr aims to double sales in 2023, expand in Europe

 REUTERS

**BYD Building Own Europe Factory More Likely Than Taking One Over**

 Bloomberg  
7 February 2023

- Carmaker reportedly in talks with Ford about German facility
- Europe, Asia bigger EV focus for BYD than US, executive says

**2023 Update!**

**China's HiPhi luxury EV brand plans Europe entry in 2023**

Reuters

March 31, 2023

Voyah completes first vehicle deliveries in Norway

Jan 3, 2023

China's Zeekr hires ex-Lexus brand veteran to helm Europe

Apr 14th 2023

 autoblog

Great Wall begins shipping 300 Coffee 01 PHEVs from Shanghai to Europe

**Cenntro Subsidiary Avantier Motors Launches Urban Micro Car in Europe**

 Seeking Alpha

Apr. 06, 2023

**ORA Chinese EV Brand Aims To Sell 6,000 Vehicles In Germany In 2023**

 CarNewsChina

2021

# New entrants to Europe's car market\* (1)

2022

Brand	Start of Sales Europe (+UK)	Countries targeted	Global Sales 2021	Europe (Inl UK) sales Volume 2021	Global Sales 2022	Europe Sales volume 2022	Europe Production Plans	Website
MG	2019	UK, France, Sweden, Germany, Norway, Denmark, Netherlands, Italy, Spain, Belgium, Luxembourg, Austria, Ireland, Iceland, Malta, Portugal	471,992	52,546	625,000 - estimate	112,927	NO	<a href="https://mgmotor.eu">https://mgmotor.eu</a>
Lynk & Co	2021	Netherlands, Sweden, Germany, Belgium	220,516	11,602	180,127	27,937	MAYBE	<a href="https://www.lynkco.com/en/">https://www.lynkco.com/en/</a>
Polestar	2021	Sweden, UK, Belgium, Norway, Netherlands, Germany	29,000	8,000	51,500	31,332	MAYBE	<a href="http://www.polestar.com">www.polestar.com</a>
Maxus	2021	Norway, UK, Ireland	232,844	5,000	232,844	1,406	MAYBE	<a href="http://www.saicmaxus.co.uk">www.saicmaxus.co.uk</a>
Aiways	mid-2020	Germany, Netherlands, France, Belgium, Denmark, Italy with Switzerland, Spain, Portugal SOS 2022	2,992	0	14,000	4,000	MAYBE	<a href="https://www.ai-ways.eu">https://www.ai-ways.eu</a>
BYD (PV)	2021	Norway	593,745	1,068	1,857,494	1,708	MAYBE	<a href="https://bydeurope.com">https://bydeurope.com</a>
BYD (CV)	2017	UK, Hungary, etc 20 countries in Europe	136,255	1,000?			YES	<a href="https://bydeurope.com">https://bydeurope.com</a>



2021

# New entrants to Europe's car market(2)

2022

Brand	Start of Sales Europe (+UK)	Countries targeted	Global Sales 2021	Europe* (Inl UK) sales Volume 2021	Global sales 2022	Europe Sales 2022	Europe Production Plans	Website
Geometry	2021	Belarus region	11,000	500	149,389	0	NO	<a href="https://www.geometryauto.com">https://www.geometryauto.com</a>
Xpeng	late-2021	Norway with SOS in Sweden, Denmark, Netherlands in 2022	98,155	100	120,757		NO	<a href="https://en.xiaopeng.com">https://en.xiaopeng.com</a>
Nio	mid-2021	Norway, SOS Germany late 2022	91,429	50	122,486		MAYBE	<a href="https://www.nio.com">https://www.nio.com</a>
Great Wall Motors (Ora, Wey, Tank, Haval )	mid-2022	Germany	1,280,993	0	1,067,523		MAYBE	<a href="https://www.gwm-global.com">https://www.gwm-global.com</a>
Great Wall --ORA	Mid-2022	Sweden, Germany, UK	135,028	0	103,996			<a href="https://gwm-ora.eu">https://gwm-ora.eu</a>
Chery	2023?	Germany?	839,781	0	1,127,289 +		NO	<a href="https://www.cheryinternational.com">https://www.cheryinternational.com</a>
WM Motors	late-2022	Italy?	44,157	0			NO	<a href="https://www.wm-motor.com">https://www.wm-motor.com</a>
Vinfast	mid-2022 - POSTPONED	France, Germany, Netherlands	30,000	0			YES	<a href="https://vinfastauto.eu">https://vinfastauto.eu</a>



2021

# New entrants to Europe's car market(3)

2022

Brand	Start of Sales Europe (+UK)	Countries targeted	Global Sales 2021	Europe* (Inl UK) sales Volume 2021	Global Sales 2022	Europe Sales 2022	Europe Production Plans	Website
Arcfox (BAIC)	2023?	Germany ?	6,009	0			YES	<a href="http://en.arcfox.cn">http://en.arcfox.cn</a>
Zeekr	2023	UK, Germany?	4,000	0	71,941	0	NO	<a href="https://zeekrlife.com">https://zeekrlife.com</a>
Rivian	mid-2022	Netherlands, UK	920	0	20,332	0	YES	<a href="https://rivian.com">https://rivian.com</a>
Ineos	mid-2022	Hambach, France	0	0	2000 estimate	2000 estimate	YES	<a href="https://www.ineos.com">https://www.ineos.com</a>
Byton	2023?	Germany,	0	0	0	0	MAYBE	<a href="https://www.byton.com">https://www.byton.com</a>
Fisker	2022	Germany, Norway, Denmark in 2022, then in 2023 UK	0	0	0	0	YES	<a href="http://www.fiskerinc.com">www.fiskerinc.com</a>
Volta Trucks	2022	UK, Germany, Italy, Spain, France	0	0	0	0	YES	<a href="https://voltatrucks.com">https://voltatrucks.com</a>
Rimac-Nevera	2022				150?	150?	YES	<a href="https://www.rimac-automobili.com">https://www.rimac-automobili.com</a>



2021

# New entrants to Europe's car market (4)

2022

Brand	Start of Sales Europe (+UK)	Countries targeted	Global Sales 2021	Europe* (Inl UK) sales Volume 2021	Global Sales 2022	Europe Sales 2022	Europe Production Plans	Website
DR	2021	Italy, Spain, France, Bulgaria	5,018	5,018	20,942	20,942	NO	<a href="http://www.drautomobiles.com">www.drautomobiles.com</a>
EVO/Fengxing/Forthing	2021	Italy, Spain, France, Bulgaria	3,333	3,333		3,904	?	
Donfeng (VOYAH, Labbrand)	2022	Norway	1,000		19,000	0	?	<a href="http://www.dongfeng-global.com">www.dongfeng-global.com</a>
Cenntro	2023	Spain	--	--	--	--	?	<a href="https://centroauto.com">https://centroauto.com</a>
HiPhi	2023	Germany?					?	<a href="https://www.hiphi.com/indexen.html">https://www.hiphi.com/indexen.html</a>



HiPhi X



Avantier by Cenntro

# New entrants to Europe's car market (4)

Brand	Start of Sales Europe (+UK)	Countries targeted	Global Sales 2021	Europe* (Inl UK) sales Volume 2021	Global Sales 2022	Europe Production Plans	Website
Lightyear	2022	Netherlands, Finland ? Sweden, UK, Belgium, Norway, Netherlands, Germany	0	0	0	YES	<a href="https://lightyear.one">https://lightyear.one</a>
Sono Motors	2023		0	0	0	YES	<a href="https://sonomotors.com">https://sonomotors.com</a>
Arrival	2022	UK, ROE	0	0	0	YES	<a href="https://arrival.com/uk/en">https://arrival.com/uk/en</a>
Switch Mobility	2023?	Spain, ROE (Rest of Europe), UK, Italy, France etc	300	0	0		<a href="http://www.switchmobility.tech">www.switchmobility.tech</a>
Canoo	CANCELLED		0	0	0		<a href="https://www.canoo.com">https://www.canoo.com</a>
Gunsel	?	Cyprus	0	0		YES	<a href="https://www.gunsel.com.tr/">https://www.gunsel.com.tr/</a>
Riversimple	?	UK	0	0		YES	<a href="http://www.riversimple.com">http://www.riversimple.com</a>
Izera	?	Poland	0		0	YES	<a href="https://izera.com">https://izera.com</a>
Uniti	?	Sweden			0	YES	<a href="http://www.uniti.earth/">http://www.uniti.earth/</a>
Frescoe Motors	?	Norway		0	0	YES	<a href="https://www.frescomotors.com">https://www.frescomotors.com</a>

Have these already disappeared? Will they reappear?



# Are these gone? Or maybe not...

**Exclusive: EV company Canoo loses another 8 executives and senior employees as it struggles with 2022 production goals**

Apr 10, 2023

CANOO SECURES OKLAHOMA CITY MANUFACTURING FACILITY

January 23, 2023 **FORTUNE**

Jan 25, 2023

CANOO ANNOUNCES DEFINITIVE PARTNERSHIP AGREEMENT WITH GCC OLAYAN AS EXCLUSIVE DISTRIBUTOR OF ITS ELECTRIC VEHICLES IN SAUDI ARABIA

# Can Sono Motors Get Its Solar-Powered EV to The Finish Line?

FEBRUARY 24, 2023



**Sono Motors has killed off its Sion EV in a pivot to solar tech business**

February 24, 2023

**The EV startup boom is over.**

EV startups are over budget and behind schedule.

March 16, 2023 **Automotive News**

**Is Rivian Making A Mistake By Giving Up On Europe Plans?**

Dec 14, 2022,



**British EV startup Arrival gets \$300 mln funding, aims to slow cash-burn**

March 13, 2023



**Arrival (ARVL) nabs \$300M in capital, yet US**

Mar 15 2023



**Rivian is opening up its first Service Center in Europe, but it's not for what you'd hope**

Mar 31 2023



**Van production remains underfunded**



# Global Exports—Chinese Brands under Geely

Brand	Parent Company	2022 Exports	Comment
Geometry	Geely	10,234	Mainly to Middle East markets, esp Israel
Zeekr	Geely	0	Target market Western Europe, 2023
Lynk & Co	Geely	27,937	Incl. direct sales +subscription model
Geely	Geely	106,431	Eastern Europe + Norway, Hungary, Middle East, Africa, Latin America.
Polestar	Geely	31,000	UK sales volume 7,345 in 2022

**Geometry C tops Israel EV sales in 2022**



2023-01-03

**Geely's EV brand Zeekr aims to double sales in 2023, expand in Europe**



**Lynk & CO to make full-electric shift in Europe in 2024**

Automotive News Europe

**Geely Auto's Exports Exceeded 100,000 Units in 2022**

Jan 10, 2023



**Polestar delivers on 2022 global volumes target**

In 2023, Polestar anticipates global volumes to increase by nearly 60% to approximately 80,000 cars, led by strong Polestar 2 sales, and later in the year the first deliveries of Polestar 3.



# Thank You!

## For further information or queries please contact [Namrita.Chow@ecgassociation.eu](mailto:Namrita.Chow@ecgassociation.eu)

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