



INDUSTRY INSIGHT

Chinese E-Mobility Industry Landscape Report

Shanghai, 2019



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- Under the guidance of the government policies and with the development of the technologies, Chinese electric vehicle industry has realized rapid growth in the past years. According to the statistics of China Association of Automobile Manufacturers, the output of domestic electric vehicle reached 517,000 in 2016, and the cumulative output of electric vehicle is expected to exceed 5 million by 2020;
- The development of electric vehicle industry has created dramatic demand in the fields of **components, application services, GPS technologies, ADAS, sensors, system integrator, semiconductor and chips**, etc.

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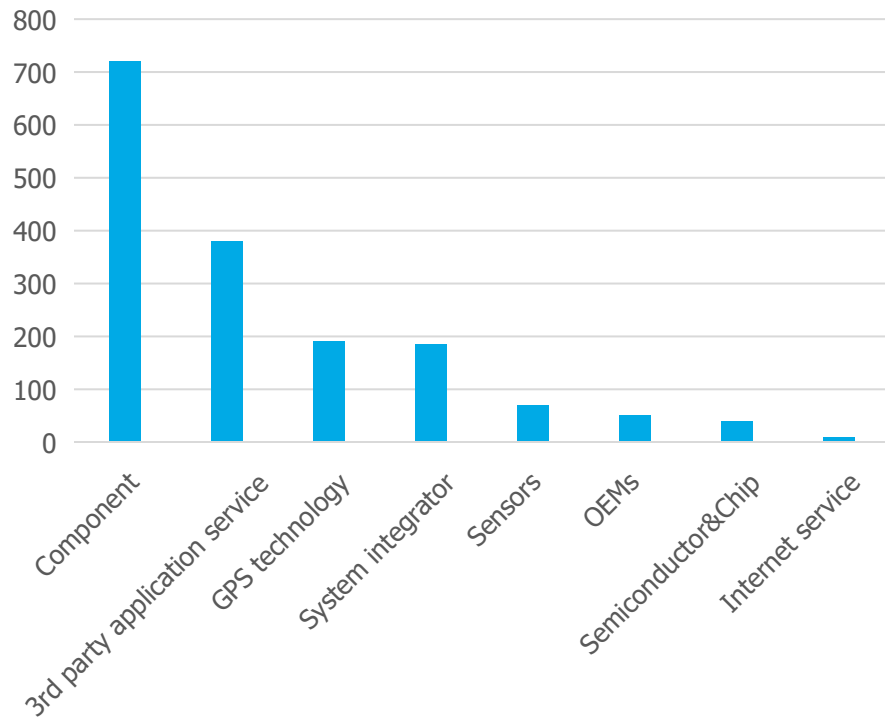
- In 2015, the global Internet of Vehicles(IoV) market reached EUR 24 billion, and is estimated to exceed EUR 40 billion in 2018, with an average annual growth rate of 26.66%. In 2015, Chinese IoV market reached CNY 155 billion, and is estimated to reach CNY 264 billion in 2017, with a CAGR of 35.41%;
- The IoV has become a hot spot in capital market. BAT, top-tier financial investors and traditional OEMs are constructing the industrial layout in IoV industry. Meanwhile, a number of start-up companies have emerged and evolved, such as NIO, WM Motor, etc.;

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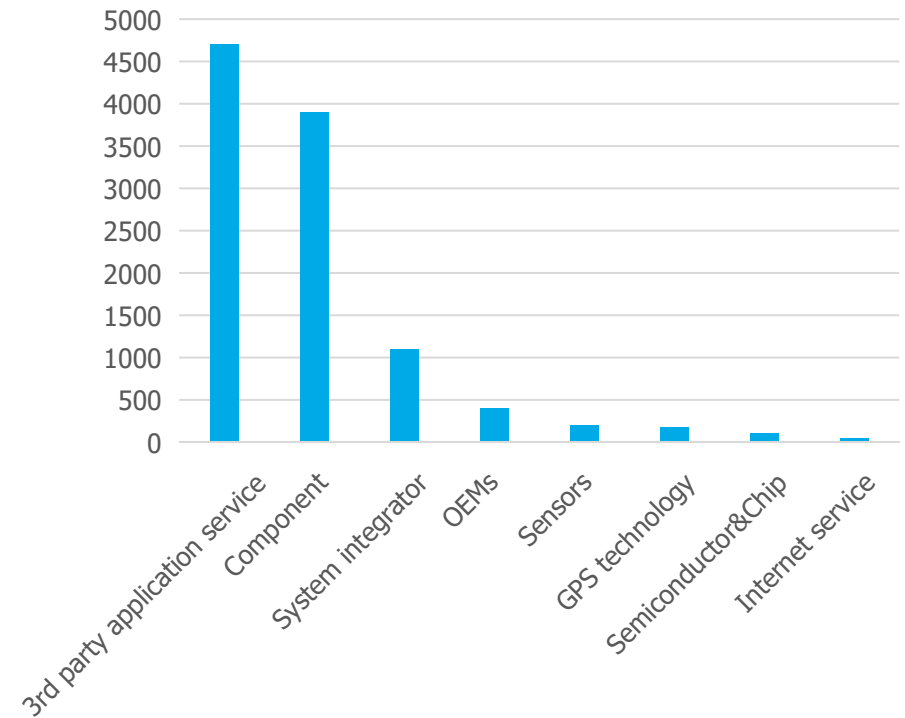
- In 2016, the global ADAS market reached USD 4 billion, and is expected to reach USD 7 billion by 2021;
- The global Internet giants have entered the field of ADAS, with Google and Tesla as the first players to explore in this field. Baidu was the pioneer in ADAS field in China and traditional OEM like Changan Automobile and other auto companies also entered the field;
- **GPS Technologies, Sensors, ADAS algorithm** are critical technologies to realize ADAS, the investment in these fields has significantly increased.

Chinese EV industrial chain overview

Number of enterprises in EV industrial chain in China



Total financing amount in EV industrial chain in China (USD million)



E-Mobility industry cluster map

EV OEMs



ADAS



Sensors



禾赛科技



GPS Technologies



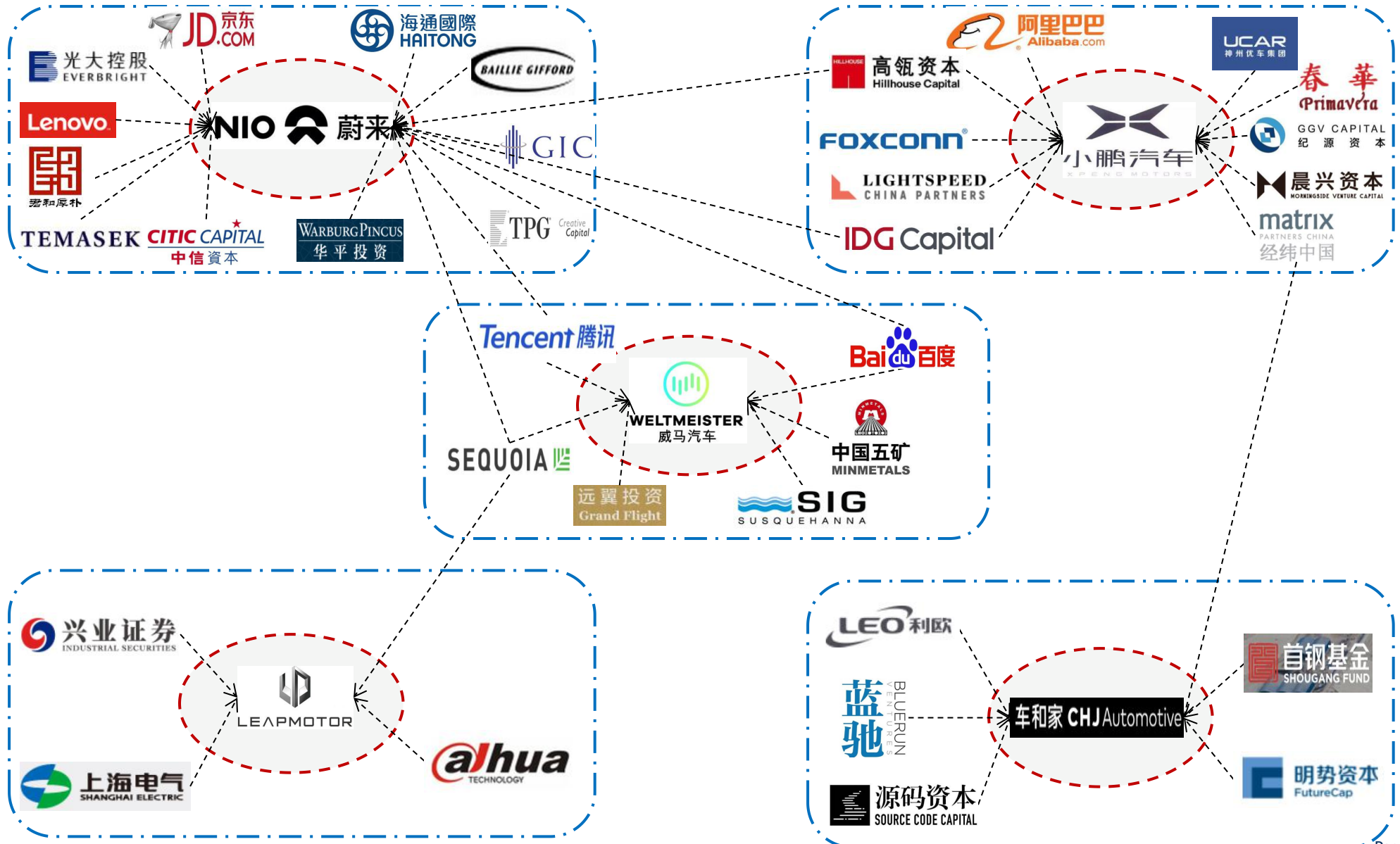
Components



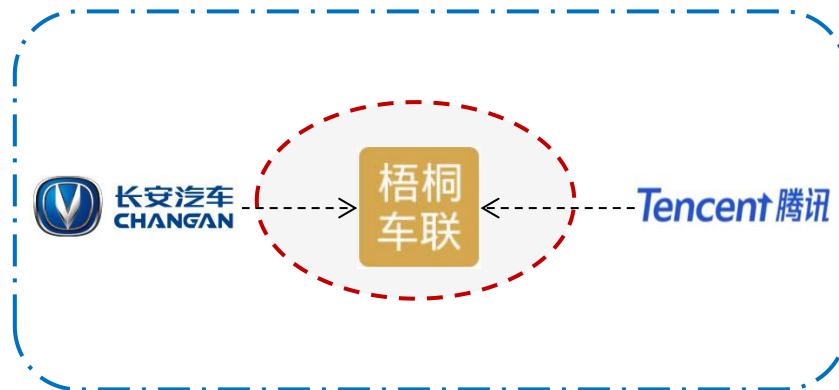
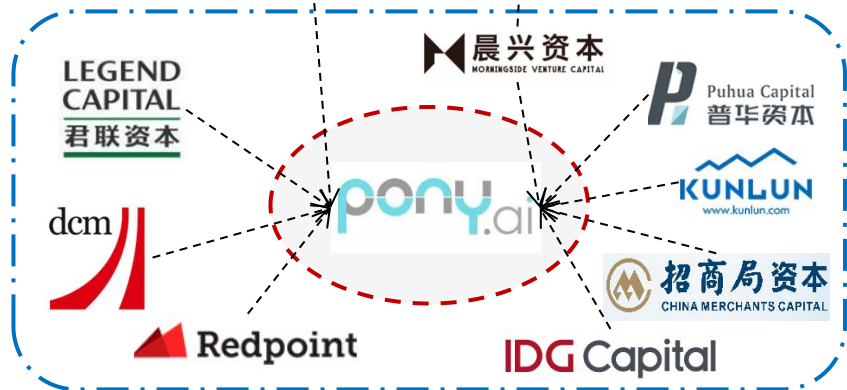
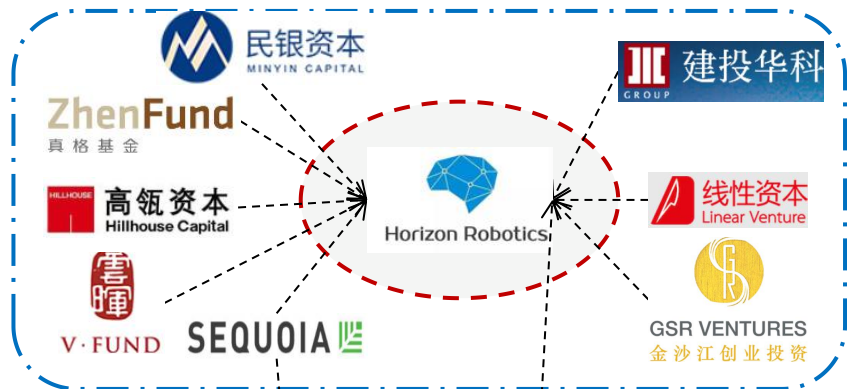
System integrator



E-mobility Landscape (1/2)



E-mobility Landscape (2/2)



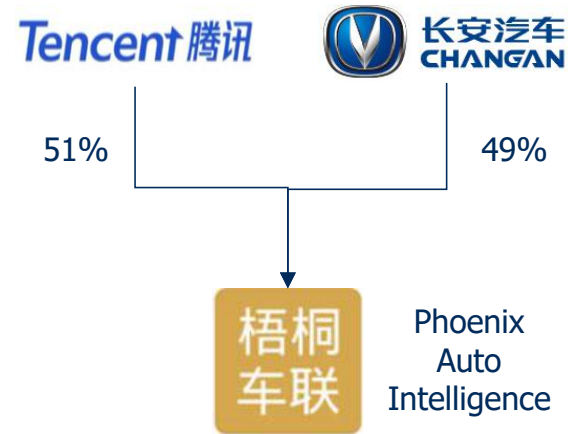
Phoenix Auto Intelligence

Providing leading telematics solution for automotive industry

Company introduction

- **Founding time:** 2018
- **Headquarter:** Beijing
- **Registered capital:** CNY 200 mln
- **CEO:** Mr. Pan Jiahua, former VP of Banma Network (Product & Design), Director of GAC Fiat (Product management)
- **Company description:** Focus on building an industry-oriented open platform in the fields of Internet of Vehicles, Big Data, Cloud Computing, etc., to provide a mature and complete vehicle networking solution for the automotive industry
- **Strategy requirement:** Look for strategic investors (e.g. Audi, VW) in the automotive industry in Europe, which can integrate its IOV solution in its car system

Shareholding structure



- On April 12, 2018, Tencent and Changan Automobile formally signed the Intelligent Networking Cooperation Agreement in Chongqing, formally announced the establishment of Phoenix Auto Intelligence
- Tencent and Changan Automobile will conduct in-depth cooperation in the areas of IOV solution, Big Data, etc. based on resources of two sides

Main OEM clients

