Electric Vehicle Platform Strategies by Chinese Automakers

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Platform Strategies of traditional Chinese Carmakers
CONCEPTS:

- Electric Vehicle’s Platforms:
  - Adapted Electric Platform (AEP)
  - New Electric Platform (NEP)

- Electric Vehicle’s Design:
  - New Electric Vehicle Design (NED)
  - Adapted Electric Vehicle Design (AED)
Belowski, Bruce; Muniz, Sergio; Cu, Camille. - Electric Vehicle Platform Strategies by Chinese Automakers: What’s Going On in the EV Arena In China?

Source: The Authors
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<table>
<thead>
<tr>
<th>IC EV</th>
<th>PHEV</th>
<th>BEV</th>
</tr>
</thead>
<tbody>
<tr>
<td>BYD Sirui</td>
<td>BYD Qin</td>
<td>BYD e5</td>
</tr>
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</table>

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EMGRAND GL

EMGRAND EV
IC EV

Geely LC

BEV

Geely Panda
Kandi Panda EV

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IC EV

- Geely LC

BEV

- Kandi K11 EV
  - (Geely-Kandi Panda EV)

BEV

- Kandi KD-5011 ("Coco")
IC EV

Roewe 950

PHEV

Roewe e950
<table>
<thead>
<tr>
<th>IC EV</th>
<th>HEV</th>
<th>BEV</th>
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<tbody>
<tr>
<td>Roewe 750</td>
<td>Roewe 750 Hybrid</td>
<td>Roewe E50</td>
</tr>
</tbody>
</table>
IC EV

5008 Nomad II

BEV

5008 Nomad II EV
Zotye Zhidou E20 EV

Zotye E200 EV
TRADITIONAL CHINESE CARMAKERS

- Are basing their EVs on their traditional ICEVs platforms, in an Adapted Electric Platform and Design (AEP/AED) strategy.
The production of NEVs by non-traditional carmakers in China is still in its early stages;

Lack of capabilities;

Most of them are still trying to meet regulatory requirements to receive their permit;

The future for the startups in China is not clear;

Most of them are building their EV platforms from scratch, in a New Electric Platform (NEP) strategy;

They are planning to combine New Electric Platform (NEP) with New Electric Design (NED) strategies.
NON-TRADITIONAL CARMAKERS

- **Non-traditional Carmakers with permits:**
  - Wanxiang Group (6)
  - Qiantu Motor (3)
  - Yangtze River EV (2)
  - Henan Suda (12)
  - Zhejiang Hezhong (13)
  - Shenzhen Ludi Fangzhou Electrocar Limited Company (14)
  - Min’An Auto (5)

- **Other players with no permits:**
  - Faraday (funded by LeEco)
  - Future Mobility
### COMPANIES THAT HAVE PERMITS SO FAR

<table>
<thead>
<tr>
<th>Part Suppliers:</th>
<th>Traditional Carmakers with NEV Independent Operation:</th>
</tr>
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<tbody>
<tr>
<td>Wanxiang Group (6)</td>
<td><strong>Beijing New Energy Vehicle Co., Ltd (BAIC) (1)</strong></td>
</tr>
<tr>
<td>Qiantu Motor (3)</td>
<td>Chery New Energy Automotive Technology Co (4)</td>
</tr>
<tr>
<td>Yangtze River EV (2)</td>
<td><strong>Zhidou (Geely) (11)</strong></td>
</tr>
<tr>
<td>Henan Suda (12)</td>
<td><strong>Yundu new energy vehicle Ltd (10)</strong></td>
</tr>
<tr>
<td>Zhejiang Hezhong (13)</td>
<td><strong>Jiangxi Jiangling Group New Energy Vehicle Co (JMEV) (7)</strong></td>
</tr>
<tr>
<td>Joint-Ventures:</td>
<td><strong>Chongqing Jinkang Xiaokang New Energy Vehicle Co (8)</strong></td>
</tr>
<tr>
<td>Min’An Auto (5)</td>
<td>Others:</td>
</tr>
<tr>
<td>NEVS (9)</td>
<td>Shenzhen Ludi Fangzhou Electrocar Limited Company (14)</td>
</tr>
<tr>
<td>JAC-Volkswagen (15)</td>
<td></td>
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Thank You!