



# Automotive Industry Weekly Digest

01-05 February 2021





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## [EV Highlights] Startup Sitech enters into partnership with Sinotruk for DEV-series EV production

Chinese electric vehicle (EV) startup Sitech signed a strategic co-operation agreement with Chinese truck manufacturer Sinotruk on 20 January to speed up the launch of Sitech's DEV-series models. Sitech will launch a new EV under its DEV series in the second quarter of 2021. The model, to be produced by Sinotruk, is expected to be a mini-size or sub-compact model. The companies said that the partnership will lead to the introduction of EVs targeting the ride-hailing market, although further details were not provided.



### Outlook and implications

Sitech launched its first EV, the DEV1, in 2018 under a partnership with Chinese automaker FAW Group. The model is a sub-compact vehicle targeting the entry-level EV market. According to data from the China Association of Automobile Manufacturers (CAAM), less than 200 units of the DEV1 were sold in the country during 2020, down from around 1,900 units sold in 2019. The partnership with Sinotruk will help Sitech adjust its product strategy, especially at a time when the market of mini-size EVs begins to experience increasing demand. In China, the Wuling Hongguang Mini EV, Baojun E100, and Baojun E200 were among the top five best-selling electric models last year in the A segment. Startup brands in the segment will be faced with intense competition as consumers buying such models are more price-sensitive than mass-market EV buyers.

## [EV Highlights] Lifan Technology unveils first EV model after restructuring

Lifan Technology, formerly known as Lifan Industry (Group), has introduced its first model to the market. The battery electric model, badged with Lifan's new logo, is based on Geely's electric multiple-purpose vehicle (MPV), the Maple V80.



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## Outlook and implications

Chongqing-based Lifan Industry (Group) began its restructuring process in August 2020. The struggling automaker has long been faced with a risk of bankruptcy due to low demand for its products and a poor financial performance. To help Lifan continue its operations, the Chongqing government-backed Liangjiang investment fund and Geely have joined forces to invest in the company. The company, now known as Lifang Technology, will receive support from Geely to help transform its business. Lifang Technology will also shift its focus to the promotion of battery-swappable electric vehicles (EVs), starting with the rebranded Maple V80. New models and the battery-swapping technology itself will be provided by Geely. Geely said last year that it intended to build 100 battery-swapping service stations in Chongqing in 2021 and further expand the network to 200 stations by 2023.



## [Policy Highlights] China to ease controls on automotive contract manufacturing

### IHS Markit perspective

**Implications** China is to ease controls further on contract manufacturing in the automotive sector to encourage companies without production permits to join the industry.

**Outlook** The new energy vehicle sector, in particular, will benefit from the action as the eased regulatory environment will encourage new players into the sector.

China is to ease regulatory controls further on contract manufacturing in the automotive sector to encourage companies without production permits to enter the industry. The action follows a statement on 26 May last year by the then minister of the Ministry of Industry and Information Technology (MIIT), Miao Wei, that controls on contract manufacturing in the new energy vehicle (NEV) sector would be eased. The minister said that his department would carry out "[an] orderly [easing of] control of contract manufacturing for new energy vehicles".

In 2018, the MIIT gave the green light to co-operation between established automakers and startup companies on condition that the latter would need to have vehicle design and development capacities. Apart from the hefty investment involved in building a new manufacturing plant, auto startups often lack production permits to launch their own production in China. The comment by Miao reiterated Chinese regulators' support for contract manufacturing, clearing regulatory uncertainties to attract new investors into the burgeoning NEV sector.



In the past four years, several Chinese electric vehicle (EV) startups have launched mass-market models under manufacturing partnerships with established automakers. NIO launched volume production of its first model, the ES8, under an agreement with JAC Motor in 2018. The two companies have jointly built a new manufacturing plant in Hefei, Anhui province. The JAC-NIO plant undertakes production of NIO's three models, the ES8, ES6, and EC6. According to an Xcar report, the two automakers have already begun preparations for the construction of a new plant in Hefei. The new production facility will help NIO to keep up with rising demand for its current and upcoming models. NIO has already reached a monthly production capacity of 5,000 units at the existing Hefei plant, according to William Li, CEO of NIO. The automaker's fourth model, the ET7 electric sedan, is to be manufactured in Anhui with JAC.

Compared to the NIO-JAC partnership, the co-operation arrangement between EV startup Xpeng and Haima Motor is more of a temporary solution for the former. Xpeng has been producing its G3 electric sport utility vehicle (SUV) under a partnership with Haima Motor since 2018. The G3 is likely to be the only model that Xpeng intends to produce at Haima's plant. In 2020, Xpeng began production of the P7 electric sedan at its own manufacturing plant



in Zhaoqing, Guangdong province. The startup is likely to allocate production of its future models to the Zhaoqing plant for better quality control.

## Outlook and implications

Chinese regulators have taken an open attitude towards contract-manufacturing deals between automakers and startup companies. The NEV sector, in particular, will benefit from such an approach as the eased regulatory environment will continue to encourage new players into the sector. Over the past few months, deals have been struck between conventional carmakers and technology companies over EV manufacturing. Companies involved in contract manufacturing these days are tempted more by the vast business opportunities that such partnerships could unlock than the cost efficiency of contract manufacturing. Chinese automaker Geely, for instance, entered into a strategic partnership with tech company Baidu earlier this month. The two companies are to form a joint venture company in China to focus on EV development and manufacturing. Baidu is to bring its advanced automotive connectivity technologies to the partnership, while new models from the JV are to be produced at Geely's manufacturing plants. According to Yang Xueliang, vice-president of Zhejiang Geely Holding Group, Geely's role in the partnership with Baidu is not just as a contract manufacturer. Geely will bring its SEA electric vehicle architecture, supply-chain resources, and vehicle engineering know-how to the partnership. Given Geely's status as an established, high-volume automaker, the deal with Baidu does serve a dual purpose: it helps Geely to scale up production of SEA-based EV models and to gather valuable experience in the field of vehicle automation, software development, and digital cabin technologies.

## [Policy Highlights] China's MIIT urges EV manufacturers to improve range in low-temperature conditions

China's Ministry of Industry and Information Technology (MIIT) has urged electric vehicle (EV) manufacturers in the country to address consumer complaints over range loss in winter conditions. According to MIIT spokesperson Huang Libin, the ministry recently organised expert panels to discuss the issue and called on automakers and their battery suppliers to work together to improve EV battery performance in cold weather conditions. The ministry also asked EV manufacturers to offer consumers specific guidance for winter driving and said that regulators would accelerate the rollout of related standards and technology requirements.



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The MIIT's comments come amid surging complaints regarding substantial range loss for EVs during low temperatures. The problem has affected a wide range of electric models on the market, although some suffer less from the issue than others. The shortened driving range of EVs in cold conditions causes consumers to doubt the practicality of EVs as it means that the driver has to charge the battery more frequently than usual. If not addressed properly through technology improvements and clear technology standards, this issue may hinder EV adoption in northern Chinese cities where temperatures can drop below 15°C in winter.



## [Technology and Mobility Highlights] Chinese startups Xpeng and NIO release new automated driving features

### IHS Markit perspective

**Implications** Chinese EV startup XPeng has said its P7 electric sedan is to feature a Surrounding Reality (SR) display, which will work together with its Navigation Guided Pilot (NGP) function, an automated highway-driving feature, to give the driver an intuitive automated driving experience. NIO has said that it is to introduce a new software update in the ES8, ES6, and EC6 models to add new features or improve existing features such as automated functions.

**Outlook** Xpeng and NIO have rolled out automated driving systems for highway autopilot functions to compete with Tesla in the field of automated driving. Tesla has been a dominate player in the EV market in terms of sales volumes; however, the high purchase price of its Full Self-Driving (FSD) automated driving system has hindered the adoption of the technology among mass-market consumers.

Chinese electric vehicle (EV) startup XPeng has announced that its P7 electric sedan is to feature a Surrounding Reality (SR) display, which will work together with its Navigation Guided Pilot (NGP) function, an automated highway-driving feature, to give the driver an intuitive automated driving experience. Meanwhile, NIO has said that it is to introduce a new software update in the ES8, ES6, and EC6 models to add new features or improve existing features such as automated functions.

Xpeng says the P7 sedan is to be the first production vehicle in the global market to feature the SR display, a function that provides the driver with lane-level navigation-assisted automated driving. According to the startup, when the vehicle's navigation function is in use, the status of the vehicle and its surrounding environment are displayed clearly and vividly in 3D on the vehicle's central panel, enhancing the user's driving experience and sense of safety. The SR technology, together with Amap's third-generation navigation system, should boost the appeal of Xpeng models to tech-savvy EV buyers. Last week, Xpeng revealed a beta version of its NGP function to a select group of journalists, who participated in test-drives of the P7 sedan in China. The startup plans to launch the feature via an over-the-air (OTA) upgrade to Xpeng customers in China in the next few weeks. The startup says the NGP feature will enable safe highway driving by "automatically performing speed limit adjustment, automatic switching to highways, optimized lane choices, automatic entering and exiting ramps, and automatic overtaking".



In a separate announcement, NIO said that it is to begin to introduce a new software update in the ES8, ES6, and EC6 models to add new features or improve existing features on the models. The update includes a summon feature, which allow the driver to control the vehicle via their mobile app. The function is capable of moving the car forwards or backwards out of a parking space, which could be useful when a vehicle is parked in a tight spot. The function will also





activate the vehicle camera when auto parking is engaged to help the system quickly identify available parking spots and safely perform the task.

## Outlook and implications

Xpeng and NIO have rolled out automated driving systems for highway autopilot functions to compete with Tesla in the field of automated driving. Tesla has been a dominate player in the EV market in terms of sales volumes; however, the high purchase price of its Full Self-Driving (FSD) automated driving system has hindered the adoption of the technology among mass-market consumers. A majority of Tesla vehicles in China only feature the EV maker's standard Auto Pilot system, which does not perform functions such as automatic lane change, and automatic overtaking on highways.



For this reason, EVs featuring automated driving technologies provided by startup EV makers began to grow in appeal to consumers. NIO said recently that its customers would be able to pay a subscription fee on a monthly basis for its next-generation automated driving system, when the technology becomes available on the ET7 electric sedan in 2022. Compared to established carmakers, startup EV makers also tend to adopt a more-aggressive technology launch strategy to attract consumers to their brands. Both Xpeng and NIO, for instance, have announced plans to install LiDAR sensors in their upcoming models to help enhance the safety and reliability of their automated driving systems in some circumstances. These initiatives should quicken the roll out of cost-efficient LiDAR solutions in mass-market production vehicles and give startup companies a competitive edge in their battle with Tesla.

## [Technology and Mobility Highlights] BlackBerry expands partnership with Baidu to power connected autonomous cars

BlackBerry expands partnership with Baidu to power connected autonomous cars in China. Under this partnership, Baidu's high-definition maps will be integrated into BlackBerry's QNX Neutrino Real-Time Operating System (RTOS). The system will be embedded, and mass produced in the upcoming GAC New Energy Aion models from the electric vehicle (EV) arm of GAC Group. Dhiraj Handa, vice-president of BlackBerry Technology Solutions APAC, said, "We look forward to continuing to work closely with Baidu to help develop and deploy leading edge autonomous driving and connected vehicle technologies to meet the ever increasing mission-critical and security requirements of the automotive industry."



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## Outlook and implications

This partnership builds on the two companies' January 2018 agreement to make BlackBerry QNX operating system the foundation for Baidu's autonomous vehicle (AV) platform, Apollo. Baidu has launched version 5.5 of Apollo, which has attracted more than 200 partners. The company has obtained more than 190 licences to test AVs and has conducted road tests in 27 cities, covering more than 7 million km. Baidu has also conducted public trials of robotaxis in Beijing, Changsha, and Cangzhou. BlackBerry has been aggressively promoting its QNX operating system in the automotive market, including for AV testing, and the company claims that the software is deployed in more than 150 million cars. The company has also launched a new security credential management system (SCMS) aimed at connected cars and smart cities. Moreover, the company is part of the pilot testing of AVs in the Canadian province Ontario.



## [Supplier Trends and Highlights] LG Innotek develops digital car key module

**Company's new digital car key module can detect the location of a smartphone five times more precisely than the existing key modules**



Source: LG Innotek

LG Innotek has developed a digital car key module with more efficient location detection precision and security, the company said in a press release on 25 January. The digital car key module uses the ultra-wideband (UWB) communication technology and a proprietary algorithm to deliver improved location detection precision. The new module also offers higher cyber security by applying a proprietary hacking prevention technology.

According to LG Innotek, its digital car key module can detect the location of a smartphone five times more precisely than the existing key modules. The company also succeeded in reducing error range between the actual smartphone's location and the recognition location from 50 cm to under 10 cm.

“It will be possible to implement various mobility services using the digital car key module to enhance customer value,” said Insoo Ryu, head of Automotive Components & Electronics Business Division. “We will continue to release innovative automotive components that can provide drivers with convenient, safe, and enjoyable driving experience,” Ryu said.

### Outlook and implications

A digital car key module is a communication component that is installed in a car, allowing wireless data transmission between the car and a smartphone. Digital key allows drives to lock/ unlock and start their vehicles using a smartphone. Users can also share their digital key to their friends and family members. The digital key technology can also facilitate new mobility services like car-sharing. In addition, drivers can also use their smartphone to oversee the vehicle conditions, including driving distance, fuel efficiency, tire pressure at a glance and also control the vehicle.

Currently, most digital keys available in the market use Near Field Communication (NFC) or Bluetooth Low Energy (BLE) technology, which have relative short detection range than more advanced UWB communication technology. In 2020, Apple introduced a new feature in iPhone called Car Key that allows users to use their smartphone as a digital car key to unlock, start, and drive their compatible vehicles without a physical key. However, the smartphone company announced that it was developing a digital key which will feature UWB technology. Earlier this month, BMW announced that it would debut the next-generation of its digital key, the BMW Digital Key Plus, featuring UWB technology in the all-new iX electric SUV, due later this year.



# [GSP] Greater China Sales and Production Commentary -2020.12

## Greater China sales

**December 2020: +6.1%; 2.78 million units vs. 2.62 million units**

**YTD 2020: -4.6%; 24.12 million units vs. 25.28 million units**

- In December 2020, a total of 2.78 million light vehicles were sold in Greater China, an increase of 6.1% compared with the same period in 2019. Specifically, light vehicle sales in mainland China rose 6% from 2.57 million units in 2019 to 2.73 million units. Passenger vehicles recorded sales of 2.31 million units, for an increase of 6.8% year on year (y/y), while light commercial vehicle (LCV) sales increased 1.6% y/y, to 0.42 million units.
- On a full-year basis, light vehicle sales in mainland China fell 4.7% from 24.82 million units in 2019 to 23.64 million units in 2020. Precisely, passenger vehicle sales decreased 6.6% y/y, to 19.74 million units, while LCV sales increased 6.3% y/y, to 3.9 million units. Segment-wise, full-year sales of sedans dropped 10.1% y/y from 10.49 million units to 9.42 million units. The sport utility vehicle (SUV) segment decreased 1.5% y/y, from 9.71 million units to 9.57 million units, in December. The SUV segment achieved double-digit year-on-year growth, and it already became the largest segment in terms of sales volume. For multipurpose vehicles (MPVs), full-year sales declined 21% y/y, to 0.77 million units.



- In December 2020, passenger vehicle sales of local brands increased 12.3% y/y, to 0.86 million units, and their market share increased from 35.4% in December 2019 to 37.2%. Meanwhile, local brands' market share climbed from 30.7% in the first half of 2020 to 34% in the second half. The government's efforts starting from July 2020 to promote new-energy vehicles (NEVs) in rural areas helped local brands gain market share. There are a wide variety of small electric vehicles (EVs) now being brought to the market, but mainland Chinese automakers are the main players in this segment.
- The health of mainland China's manufacturing sector continued to improve in December, albeit at the softest rate for three months. After reaching a 10-year high of 54.9 in November, the Caixin China General Manufacturing Purchasing Managers' Index™ (PMI™) retreated to 53.0 in December. Growth in production, total new orders, and export sales moderated, while employment was broadly unchanged. With expected mass COVID-19 vaccinations in 2021, the mainland Chinese economy should vigorously rebound, and mainland China's GDP will likely increase 7.6% in 2021 and 5.6% in 2022.
- The mainland Chinese auto market has improved noticeably over the past three months, thanks to the rollout of government incentives and the slowdown of the spread of the COVID-19 virus in the country. Looking ahead, there should be much stronger year-on-year sales growth in first quarter 2021 since the



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same period in 2020 was clouded by the COVID-19 outbreak. For 2021, light vehicle sales will likely grow by 6.2% to 25.1 million units, following a decline of 4.7% in 2020, assuming an extension of regional incentives as encouraged by the State Council in November 2020 and an expected rebound in economic growth next year.

## Greater China production

**December 2020: +0.6%; 2.66 million units vs. 2.65 million units**

**YTD 2020: -4.2%; 23.64 million units vs. 24.67 million units**

- Greater China's light vehicle production in December recorded 2.66 million units, marking a slight rebound of 0.6% year on year (y/y). In mainland China, light vehicle production increased 0.7% y/y, to 2.64 million units. With tremendous production growth in October and November, along with strong demand on the retail side, another round of growth was expected in December. However, deeply affected by the chip shortage, some output at joint ventures was likely dragged in December, which directly resulted in a decline in growth in the last month of 2020.

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## [VIP ASSET] Semiconductor supply issue: Light-vehicle production tracker

Since the end of 2020, there have been reports of disruption within the supply chain of semiconductors to the automotive sector. Pressure built up as the automotive industry recovered from the widespread coronavirus disease 2019 (COVID-19) virus pandemic-related lockdowns experienced during the first half of 2020, and that recovery cycle clashed with increasing demand from the wider consumer electronics sector, which was itself recovering strongly and late in the year, building stocks for the holiday season.



Semiconductor  
Shutterstock/Dario Lo Presti

As a result of these pressures, light-vehicle manufacturers are finding increased disruption to the supply of systems using semiconductors in the first quarter. Currently there are varying estimates as to the length of the semiconductor shortage, with some suggestions that the situation will improve from the second quarter onwards, while some of the lower level disruption could even be recovered within the current quarter.

Below is a list of those that have been identified by IHS Markit as of week ending 22 January 2021. More updates relating to this highly fluid situation will take place when more intelligence is available.

### Europe

- Daimler is set to undertake short-time work at Rastatt (Germany) during the first quarter of 2021 for all models on the MFA architecture, with the exception of the Mercedes EQA. In addition, the Bremen (Germany) plant will undertake some production down days from the first week of February.
- Ford is closing its Saarlouis (Germany) plant between 18 January and 22 February, while four weeks of production has been put on hold at Valencia (Spain) during the first quarter.
- Honda stopped production at its Swindon (UK) facility between 18 and 21 January.
- Nissan cut two shifts on one production line at Sunderland (UK) between 21 and 25 January.
- VW Group facilities in Europe will be severely affected during the first quarter. At the important Wolfsburg (Germany) facility, production of the VW Golf was put on hold between 4 and 18 January, while there will be four days of production stoppages on two lines during January. Elsewhere in Germany, the Emden plant is being shut for 10 days during January, while Audi A4 and A5 production will be put on hold





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at Neckarsulm for two weeks in January and at Ingolstadt between 21 and 29 January. Poznam (Poland) will take a hit to light commercial vehicle (LCV) production, while Skoda production will take a hit at Mlada Boleslav and Kvasiny (both Czechia). In addition, the Martorell (Spain) will reduce production of MQB-based models from three shifts to two during the first quarter.

- Stellantis is said to have had supplies of its formerly Group PSA battery electric vehicle (BEV) models affected during January and February, but is expecting to make up these losses by the end of the first quarter.

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## [VIP ASSET] US president aims for more EVs in federal vehicle fleet

### IHS Markit perspective

<b>Implications</b>	US President Joe Biden has issued an executive order aimed at more stringent adherence to 'Made in America Laws' applicable to federal government purchases, as well as changes to processes for waivers and increased transparency. The president said that he would like to see the full government fleet move to zero-emission alternatives and EVs.
<b>Outlook</b>	While the executive order sets the policy and direction and is likely to have an impact on sourcing decisions at the federal level, it does not specify new waiver requirements. The president did not set any particular timeframe for the shift to EVs within the government fleet. A barrier for a quick shift to EVs is that the current federal fleet mix by vehicle type is not aligned with available EV alternatives.

US President Joe Biden issued an executive order on 26 January 2021 regarding increasing efforts to increase the purchasing of American products by federal agencies. The executive order sets the Biden administration policy that federal financial assistance awards and procurements should maximise "goods, products, and materials produced in, and services offered in, the United States". The executive order instructs federal agencies to review actions; consider suspending, revising, or rescinding agency actions inconsistent with the policy; and propose any changes needed to enforce the policy. It also sets out a process for updating the ability for waivers to the 'Buy American' policy, including establishing a Made in America Office within the Office of Management and Budget (OMB). The order calls for more transparency, including a website where waiver requests must be posted. Biden, in his remarks, said that this is to ensure that if a US supplier thinks it can provide the work, it is aware of the waiver request and can step in with a proposal. The order also insists, where possible, if a waiver is granted for cost advantages, that the agency assess whether the cost advantage is a result of products created with dumped steel, iron, or manufactured goods. There are a number of other efforts made to support previous 'Made in America Laws', as well as the revocation of some executive orders issued by former president Donald Trump relating to infrastructure and the US Postal Service, and those that eased restrictions and made waivers easier to obtain.



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What the executive order does not do is specify a target for the purchasing of electric vehicles (EVs). However, in a statement announcing the executive order, the president addressed his policies relative to EVs. In the statement, Biden said, “The federal government also owns an enormous fleet of vehicles, which we’re going to replace with clean, electric vehicles made right here in America by American workers, creating millions of jobs — a million autoworker jobs in clean energy — and vehicles that are net-zero emissions. And together, this will be the largest mobilization of public investment in procurement, infrastructure, and R&D since World War Two.” Biden also said that he will close the loopholes to the ‘Buy American’ content requirements; he added that the requirement that 50% of vehicle components must be made in America to be considered for federal purchase is too low and notes that the way content is currently measured does not properly value impact. He aims to change this to reflect the value the components are contributing to the US economy, which should be “measured by things like a number of American jobs created and/or supported”. While Biden said that the 50% requirement is too low, neither his remarks nor the published executive order propose an alternative figure.

## Outlook and implications

While the executive order sets the policy and direction and is likely to have an impact on sourcing decisions at the federal level, it does not specify new waiver requirements or indicate that the rules for issuing waivers be changed. The executive order sets the policy to be followed within each agency’s procurement process. The president also did not set any timeframe for when the government fleet should be replaced by zero-emission vehicles. A barrier for a quick shift to EVs is that the current federal fleet mix by vehicle type is not aligned with available EV alternatives.

In 2015, former president Barack Obama signed an executive order mandating that the federal fleet be comprised of at least 50% zero-emission vehicles by 2025. According to the 2019 Federal Fleet Report, at the end of 2019, the federal government had owned only 3,215 EVs, 1,260 plug-in hybrid electric vehicles (PHEVs), and 25,738 gasoline (petrol) hybrid vehicles, suggesting that there has really been no progress on the 2015 executive order. This may be partly attributable to the lack of inventory to reach the mandate, which continues to be an issue. This could be addressed as EVs join the market in more segments and at different price points, although not quickly. Nearly 38% of the current government passenger car fleet is categorised as light-duty or medium-duty sport utility vehicles (SUVs) in the government report.

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## [SAVE THE DATE] Automotive Spring Briefing - Asia Pacific



### 2021 Automotive Spring Briefing - Asia Pacific

## Automotive 2021 - Another year on the rollercoaster?

#### EVENT DATE

Americas: **23 March 2021, Tuesday**

Asia Pacific: **25 March 2021, Thursday**

2020 was a very turbulent year for the global economy, but there is a lot of hope that 2021 will be the year where things start to return to normal. Throughout the COVID-19 pandemic, governments around the world launched financial stimulus packages for their economies at unprecedented rates. Various vaccines have now been certified for usage and immunization campaigns have been started at a large scale. However, fast-spreading mutations are being detected and major economies are forced into repeated lock-downs to keep the infection levels under control.

The automotive industry found a path to mitigate the impacts of these continuously changing uncertainties in the second half of 2020, but will this lead to a solid recovery of business in 2021 and beyond or will we see prolonged periods of turbulence? And how will key trends such as compliance and new mobility prevail in this environment?

Please join us for our spring automotive client briefings, where we want to share with you our latest views on the state of the global automotive industry and scenarios on how things could develop going forward.

#### EVENT FEE

**Gate fees apply for this event.**

*Complimentary passes will be given to existing IHS Markit Automotive clients.*

#### REGISTRATION

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