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**OEMs' Passenger Car  
Model Planning Research  
Report, 2024-2025**  
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# Model Planning Research in 2025: SUVs dominate the new lineup, and hybrid technology becomes the new focus of OEMs

OEMs' Passenger Car Model Planning Research Report, 2024-2025 focuses on the medium and long-term product strategic plans announced by major OEMs, covering independent, emerging and joint venture brands, and systematically sorts out their sales goals, model layout/planning, and key information such as key models.

## 1. Compared with emerging OEMs, traditional OEMs seek growth with stable sales.

According to data from OEMs that have announced sales goals, traditional OEMs generally adopt a strategy of making progress while maintaining stability in terms of sales goals in 2024, focusing on the steady expansion of the market and the solid increase in market share. On the other hand, emerging OEMs have shown a more radical and expansionary attitude, actively seeking to rapidly expand their market share and enhance their brand influence. For example, AITO aims to sell 600,000 vehicles in 2024, with the actual sales increasing by approximately 538% compared to 2023. Neta has a sales goal of 300,000 vehicles in 2024, with the actual sales rising by about 136% from 2023.

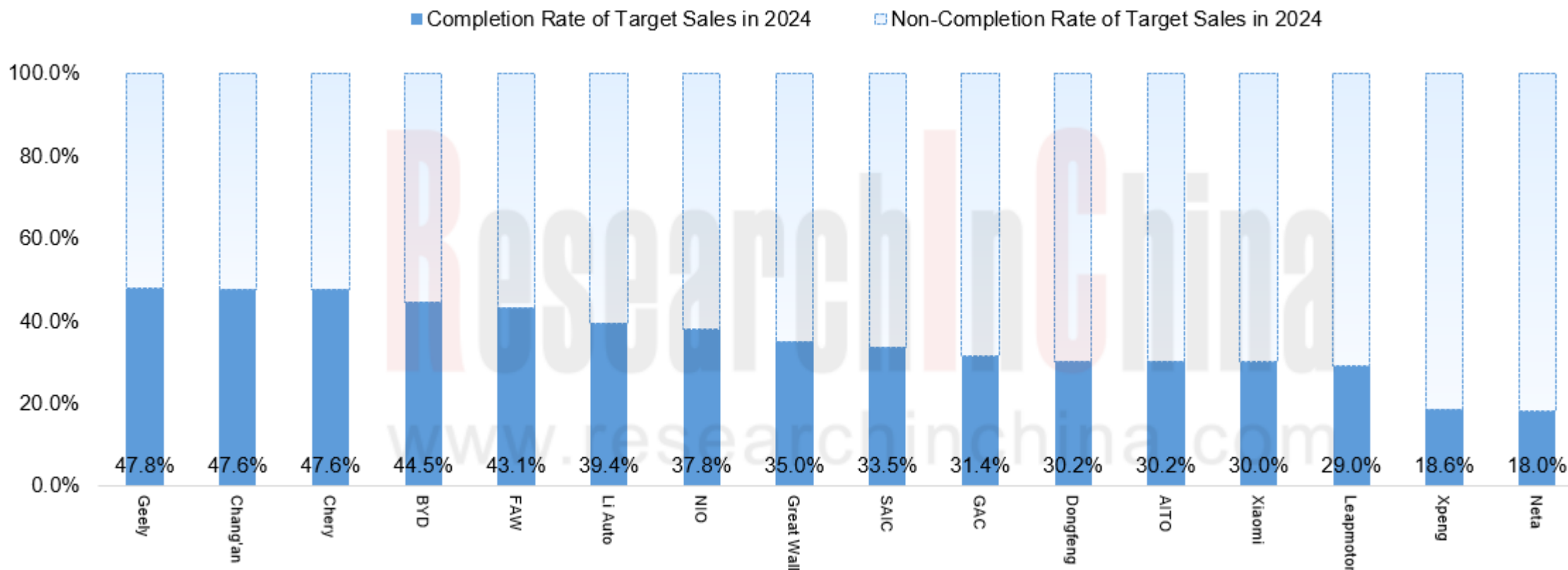
Sales Goals of Major OEMs in 2024

OEM	Actual sales volume in 2023 (10,000 vehicles)	Sales goal in 2024 (10,000 vehicles)	Y-o-Y growth rate (%)	
Traditional OEM	Dongfeng Group	208.8	320	53.3%
	Great Wall Motor	123.1	160	30.0%
	BYD	302.4	362.4	19.8%
	Geely	168.7	200	18.6%
	Chery	188.1	212.6-231.4	13-23%
	GAC	250.5	275	9.8%
	Changan Group	255.3	280	9.7%
	SAIC	502.1	545	8.5%
	FAW	336.7	347	3.1%
	BAIC	170.8	/	/
Emerging OEM	AITO	9.4	60	538.3%
	Neta	12.7	30	136.2%
	Xpeng	14.16	28	97.7%
	Leapmotor	14.4	25-30	73.6-108.3%
	NIO	16	23	43.8%
	Li Auto	37.6	48	27.7%
	Xiaomi	/	10	/

Source: Public information; ResearchInChina

# Target Sales Completion Rate of Major OEMs in 2024

The actual sales of Geely, Changan, Chery, BYD and FAW in the first half of 2024 are close to 50% of their goals. With the successive launch of new models by major OEMs in the second half of the year, as well as the year-end shopping spree and holiday promotions, these five major OEMs are expected to successfully achieve their full-year sales goals.



\*BAIC Group does not explicitly announce the sales target for 2024, it will not count the completion of target; Chery and Leapmotor count the completion according to the highest sales target value.

Source: ResearchInChina

# From 2024 to 2026, Chinese automakers will launch about 330 new models

According to the number of model planning disclosed by OEMs, Chinese OEMs will launch 380-390 new cars (covering independent/joint venture and emerging brands; models include new/modified models) from 2024 to 2030. Of these, about 330 new cars will be launched from 2024 to 2026.

Number of New Cars Launched in 2024-2030

OEM	2024	2025	2026	2027	2028	2030
SAIC	35	11-12	6			
FAW	35		1			
BYD	16	5				
Geely	11	13	5	3		
Dongfeng Group	18	22				
Changan Group	20	7-9				
GAC	6	13				
BAIC	12	22-24				
Great Wall Motor	11					
Chery	51					
NIO	2	2				
Xpeng	30					
Li Auto	5	5				
Neta	2	1				
Leapmotor	2	2-3	2-3	2-3		
AITO	1					
Xiaomi	1	1	1			

Source: ResearchInChina

\*The statistics on the number of new cars released here are mainly based on the number of specific model planning that have been publicly disclosed by each OEM.



# Product Portfolio of Chery in 2024-2026

This report also summarizes the future model planning information that has been disclosed by major OEMs. Through detailed product portfolio analysis, keywords such as "SUV", "EV" (pure electric vehicle) and "EREV" (extended-range electric vehicle) have become the core focus of each OEM's product strategy in the next three years.

Taking Chery as an example, the new models launched from 2024 to 2026 will be dominated by SUVs, which indirectly reflects the continued high demand for SUV models in the market. In addition, Chery also attaches great importance to the transformation and upgrading of automotive energy structure, incorporating new energy models such as electric vehicles, plug-in hybrid vehicles, and extended-range vehicles into the key components of its new car series.

## Product Portfolio of Chery in 2024-2026

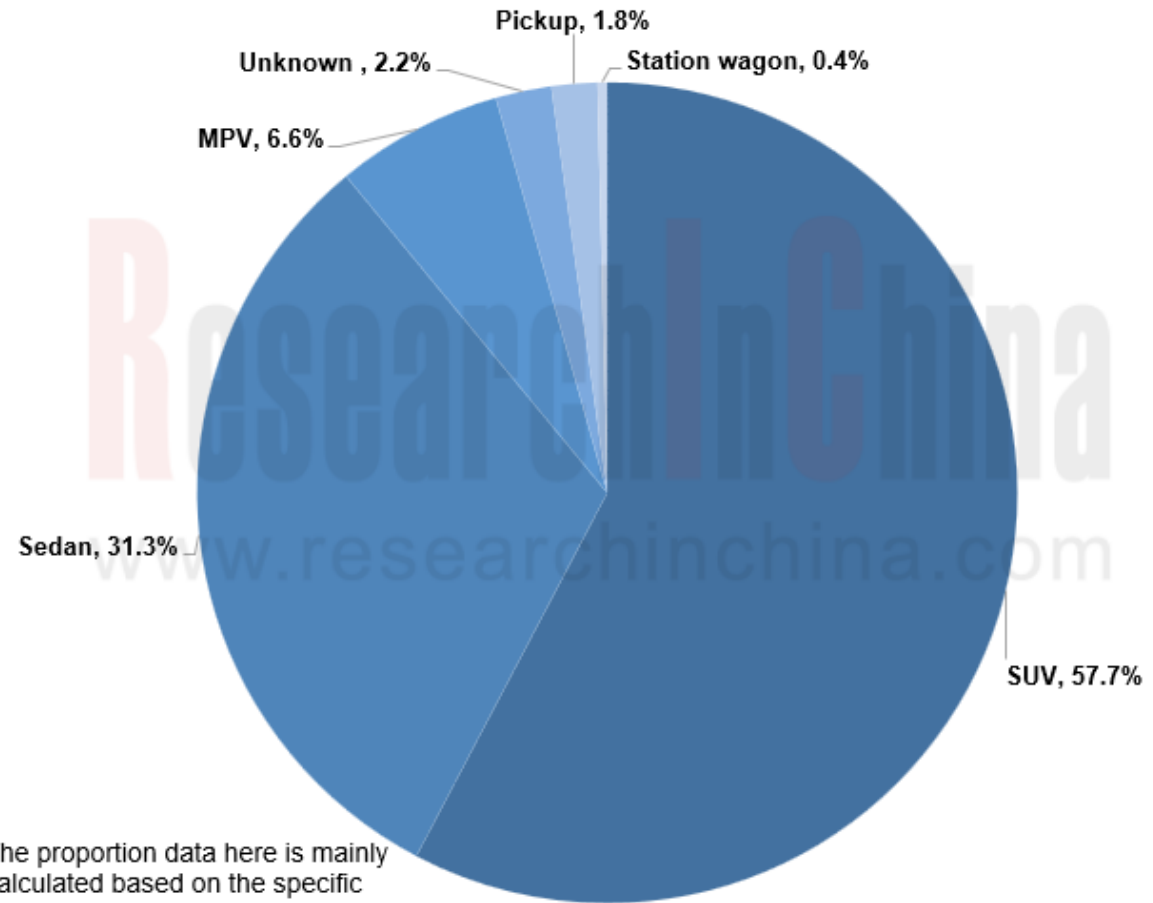


\* Color pictures are listed models, and gray pictures are models to be listed.  
Source: ResearchInChina

# Model Positioning Structure of New Cars in 2024-2027

SUV models continue to occupy an important share of automotive market due to their advantages such as spacious space, excellent driving vision, and strong performance. In view of this, both traditional automakers and emerging OEMs have deployed a variety of SUVs in their subsequent model plannings (SUVs account for 57.7% from 2024 to 2027), in order to fully meet the growing and diverse needs of consumers.

### Model Positioning Structure of New Cars in 2024-2027

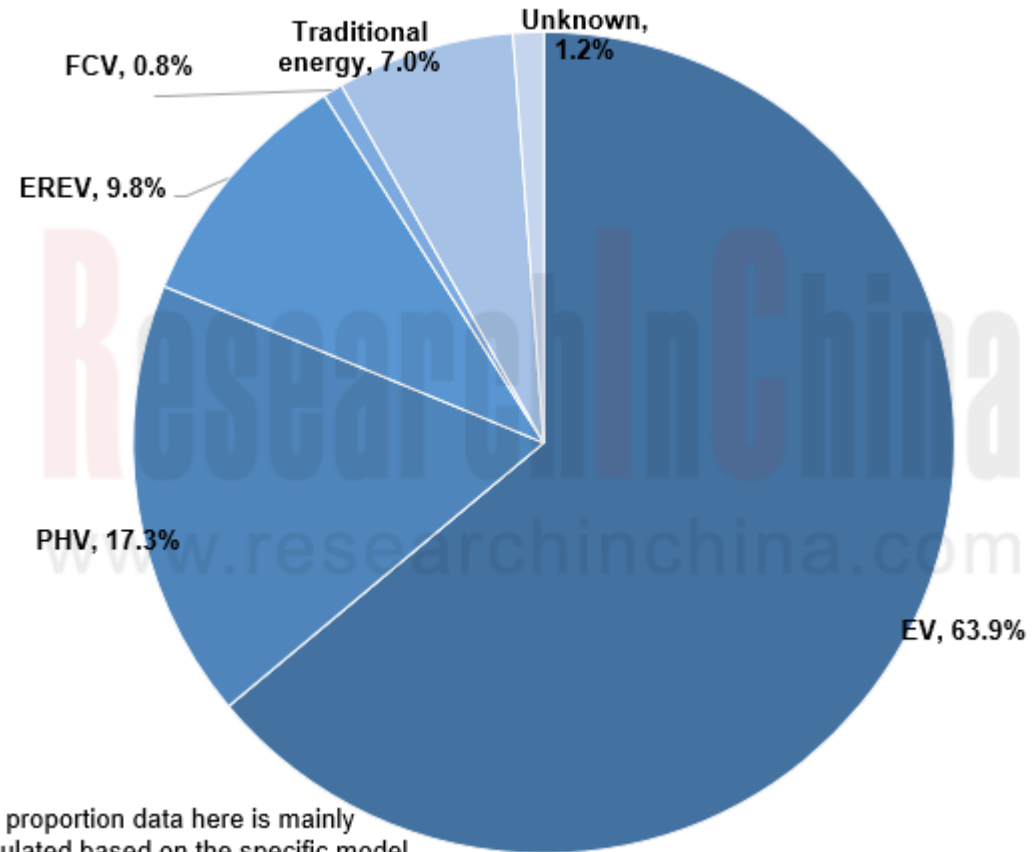


● The proportion data here is mainly calculated based on the specific model information that can be learned.

Source: ResearchInChina

From the perspective of energy types, in the new car planning for 2024-2027, new energy vehicles still dominate, accounting for 91.8% (mainly pure electric vehicles, accounting for 63.9%; plug-in hybrid followed, accounting for 17.3%). In addition, major OEMs have begun to layout extended-range vehicles in new car planning, such as GAC Aion, SAIC IM, Changan Avatr, Li Auto and other brands have considered/adopted "pure electric" and "extended-range" parallel strategies.

## Energy Type Structure of New Cars in 2024-2027



- The proportion data here is mainly calculated based on the specific model information that can be learned.

Source: ResearchInChina

# More OEMs adopt a parallel strategy of pure electric, plug-in hybrid, and extended-range multiple technology routes

Although pure electric models are regarded as the future development direction of automotive industry, their core issues such as cruising range and convenience of replenishment have not been fully resolved, which limits consumer acceptance to a certain extent. In contrast, hybrid models, as a transitional technical solution, have gradually gained wide market recognition for their advantages such as long battery life, mobility economy and tram comfort.

After reviewing the product strategic planning of major domestic OEMs, it is not difficult to find that more and more OEMs are actively launching plug-in hybrid and extended-range new models on the basis of their existing product lines. These new models will not only enrich consumers' choices, but also further promote the diversified development of the new energy vehicle market.

**Case 1:** In August 2024, Avatr Technology officially released extended-range technology - Kunlun Range Extension, entering the range extension market, and will release a variety of pure electric and extended-range power models in 2024.

**Case 2:** Xiaomi Automobile will launch its fourth model in 2026 - an SUV model with extended range power. The car is also equipped with rear wheel steering and uses Bosch IPB 2.0 braking solution.

In addition, in the face of uncertainty of the pure electric market, some multinational OEMs have also flexibly adjusted their electrification transformation strategies and shifted their strategic focus to hybrid field. This shift is mainly based on the slowdown in growth rate of pure electric market, consumer energy replenishment and battery life anxiety, insufficient infrastructure, and high cost of pure electric vehicles.



# Product Strategy of Major OEMs

OEM		Product strategy
Traditional	SAIC	SAIC Roewe will rely on the three new technologies of "New Generation SAIC MSP Pure Electric System Platform", "New Generation DMH Dual Motor Hybrid Technology" and "New Generation Rubik's Cube Battery System" as the base to accelerate the transformation of new energy and achieve full coverage of product lines in the field of <b>pure electricity and hybrid</b> .  IM will adopt a parallel strategy of " <b>pure electricity</b> " and " <b>extended range</b> ", and start launching extended range products in 2025.
	FAW	From 2023, China FAW will promote "All in" new energy strategy; by 2028, FAW will launch a total of 11 <b>pure electric models and 11 plug-in hybrid models</b> .
	GAC	GAC Group will actively promote comprehensive deployment of its independent brand new energy models for EV (pure electric), PHEV (plug-in hybrid) and REV (extended range hybrid), and plans to launch new PHEV and REV models in 2025. According to the company's plan, GAC Trumpchi will continue to upgrade its products in the field of gasoline vehicles in the future; at the same time, it will focus on the <b>plug-in/extended range/gasoline-mix market</b> . GAC Aion changed its current strategy of only making pure electricity. According to the official plan, models equipped with range extension technology will be launched in 2025 to complement the <b>REV and PHEV</b> product lines.
	Changan Group	In 2024, Changan Automobile will continue to launch a variety of <b>extended-range models</b> . Avatr officially released the range extension technology - Kunlun Range Extension in August 2024. Fully enter the range extension market, and will release a variety of pure electric and range extension power models in 2024 to form an " <b>EV + REEV</b> " product layout. Deepal is also jointly promoting two technical routes of pure electric + range extension.
Emerging Brands	Xpeng	Xpeng's first <b>extended-range model</b> has completed the designation of core components in 2024H1, and is under internal development. It is expected to be mass-produced in 2025H2.
	Leapmotor	In 2023, C11 Extended Range Edition was launched, opening the company's " <b>pure electric + extended range</b> " dual-power layout and further enriching the product structure.
	Li Auto	In 2024, Li Auto will enter the stage of advancing <b>range extension + pure electric</b> dual technology route.
	Xiaomi	In 2026, Xiaomi will launch an SUV with <b>extended range power</b> .
Multinational OEMs	Toyota	Toyota adheres to the diversified development of <b>EVs, PHEVs, HEVs, and FCVs</b> , and actively promotes the implementation of electrification technologies such as solid-state batteries and hydrogen fuel cells.
	Hyundai	Focusing on the development of electrification, Hyundai's mid-term goal is to launch a next-generation <b>hybrid system</b> with stronger performance and higher fuel efficiency, and plans to launch a new <b>EREV model</b> .
	Kia	In the transition to all-electric, Kia's mid-term goal is to focus on <b>hybrid systems and plug-in hybrid models</b> .
	Audi	In July 2024, Audi announced that it will expand and upgrade its <b>hybrid product</b> line in the coming years to achieve the goal of all-electric models by 2033. The dual-line layout of fuel and electric vehicles will be retained in the main model segments.

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