

China, the Engine Room of Global Automotive Innovation

Regulatory Issues and China's Auto Market

政策法规对中国汽车产业的影响

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The Auto Market Today

中国的汽车市场

Future Trend & Drivers

未来市场的走向和影响因素

Recent Policies & Regulations

近期的相关政策和法规

Overall Economic Growth 经济持续增长

1. **Average GDP growth 7-8%** GDP增幅

2. **Active fiscal policy** 积极的财政

3. **Average annual growth in output 10-15%** 汽车年
产量均增 15% 左右

Administrative Control 行政干预依然存在

- 1. Auto Industry Development Policy** 产业政策
- 2. Market entry** 市场准入
- 3. 50:50 Equity Share JV for OEMs** 股比限制
- 4. JVs for the same type of vehicles** 项目限制

Emphasis on the Rule of Law 法制增强

- 1. Type/Product Approval** 认证
- 2. Safety: compulsory tests, frontal collision** 安全碰撞法规
- 3. Emission Control: Euro III & II** 排放
- 4. Consumption Tax** 消费税
- 5. Consumer Protection: Recall** 消费者保护
- 6. Fuel consumption level:** 燃油消耗限制

Recent Policies & Regulations

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Independent Innovation and Brands

自主创新和自主品牌

1. National strategy

国家战略决策

2. From low-cost to technology advantage

低成本优势到技术创新优势

3. Ministry of Science & Technology

科技部主导

4. Comments from top leaders

领导人关注

5. Fair competition and support local brands

为自主品牌创造公平竞争环境

6. EV 电动汽车

GOVERNMENT INCENTIVES - OVERSEAS

Country	Consumer incentives
 United States	Up to \$13,500 ¹
 UK	Up to \$7,800 (£5,000)
 China	\$19,000 ² (120,000 yuan)
 France	Up to \$6,700 (€5,000)
 Ireland	Up to \$6,700 (€5,000)
 Portugal	Up to \$11,700 ³ (€9,500)
 Spain	Up to \$8,000 ³ (€6,000)
 Belgium	Up to \$13,550 ³ (€11,000)
 Canada	\$5,000 - \$8,500 ⁴
 Australia	\$0

Thank You