中國大陸車廠電動乘用車開發現況與合作機會分析

The Development of Electric Passenger Vehicle of Chinese Automotive Manufacturers and Cooperation Opportunities

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關鍵詞

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摘要

中國大陸擁有全球最大之汽車市場，在中國大陸政府大力推動電動車產業化之下，預期將成為全球主要的電動車市場之一，對於台灣的電動車系統與關鍵零組件供應商而言，中國大陸在電動車發展上，起步落後歐美日先進國家，技術與供應體系尚未成熟，因此有較大的切入機會。

車廠的採購或配套模式依車廠屬性而有所差異。中國大陸車廠可大致區分為合資企業與自主企業，由於合資車廠之生產車型皆由國外母廠完成開發後再導入生產，在技術與規格由國外母廠掌握下，採購的主導權亦屬於國外車廠。雖然國外車廠中歐美企業的供應體系較為開放較高，但在關鍵零組件的採購上，仍然會偏向 Bosch、Delphi 等歐美供應商。

車輛電動化之下衍生對於電動驅動系統與電池系統等關鍵零組件的需求，此潛在的龐大商機雖然吸引許多廠商投入相關系統與零組件的開發，然而多數廠商除了缺乏電動車相關零組件的供貨實績，甚至缺乏車輛產業的經驗，因此無法取得與歐、美、日等先進車廠合作的機會。相反的，中國大陸自主車廠進入汽車產業的時間短，電動車的發展上亦落後先進國家，電動車系統整

合技術尚未成熟，因此對於電動車系統供應商而言，為優先接觸的對象。

China is the largest automobile market in the world. Driven with full-fledge efforts from the Chinese Government for the commercialization of electrical motor vehicles, it will also emerge as a major electrical automobile market at a global level. In view of the perspectives from the suppliers for electrical motor vehicle systems and critical parts and components in Taiwan, the Chinese initiation of electrical motor vehicle developments is lagging behind the developed countries (USA, Europe, and Japan). The technology and supply systems are not yet at the mature stage, thus creating a greater opportunity for penetration, especially for the system suppliers.

The motor vehicle manufacturers' procurement models vary according to the motor vehicle manufacturer's characteristics. The Chinese motor vehicle manufacturers can be classified into the joint venture and proprietary corporations. Due to the fact that the car models produced by the joint venture motor vehicle manufacturer are all developed by the oversea parent company. As the technologies and specifications are controlled by the foreign parent company, the procurement decision-making authority also lies in the hands of the foreign motor vehicle manufacturer. Even though the supply systems of the European and American corporations among the foreign motor vehicle manufacturers have a higher degree of transparency, they still prefer to purchase the critical parts and components from the European and American suppliers, such as Bosch and Delphi.

The demands for the critical parts and components of electrical drive systems and battery systems have been derived from the electrification of the motor vehicles. Although this potentially tremendous commercial opportunity has attracted many corporations to be involved in developments of associated systems, parts and components, a majority of suppliers lack track record of supplying related electric vehicle parts and components, but are also deficient of automobile industry experiences. Thus they are unable to acquire opportunities to cooperate with leading motor vehicle manufacturers from Europe, United States, and Japan. On the contrary, proprietary motor vehicle manufacturers from China have only established a short-term presence in the automobile industry and are lagging behind the developed countries in terms of electric vehicle developments. The electric vehicle system's integration technologies still remain immature. To the electrical motor vehicle system suppliers, therefore, they are the candidates for the priority interactions.

前言

電動車產業亦爲我國重點發展產業，除了於2009 年納入「綠色能源產業旭升方案」，並規劃