

2018年3月21日上午，L.E.K. Consulting（艾意凯咨询）联合 JSC Automotive（JSC）在艾意凯咨询上海办公室举办了一场题为“电动汽车将如何重塑汽车行业？”的高层圆桌论坛。来自主流汽车厂商、核心供应商、专业投资机构等十几家公司的高层管理人员参加了此次圆桌论坛。论坛上，艾意凯咨询董事总经理滕勇博士、JSC 董事总经理 Jochen Siebert 先生分别就“动力电池市场机会分析”和“新能源汽车的产业政策评估”发表了主题演讲。此外，与会嘉宾与专家就目前新能源汽车相关产业现状及未来发展趋势进行了深入探讨。



滕勇博士表示，动力电池成本约占新能源汽车总成本的 1/3 到 1/2，是整个产业链的核心。预计到 2020 年，中国的动力锂电池产能将达全球的 60-65%，成为最重要的市场。随着技术和市场的发展，动力电池不同环节间的垂直整合趋势愈渐明显。比如，电池制造商正寻求加强对上游资源的掌控，以降低原材料紧缺及价格波动对自身的影响；此外，电池厂商的扩张也进一步加剧，加快产能布局，建立“巨型工厂”，以提高效率，获得规模效应。在现场讨论中，大家普遍认为行业整合必将是大势所趋，但并不一定适合每家企业，这需要综合考量资金压力与风险、上下游协调同步、自身发展定位和技术能力等因素。

在中国，新能源汽车产业的发展离不开政府政策的指引和支持。这就要求产业链上的各类企业都能迅速对接政策变化，调整发展战略。2017年9月28日，中国五部委联合出台的《乘用车企业平均燃料消耗量与新能源汽车积分并行管理办法》是对新能源汽车行业的一次大的调整。JSC 表示：“双积分制旨在建立节能与新能源汽车管理的长效机制，加速节能减排，缓解环境与能源压力。而这将对中小规模的新能源车企造成沉重的成本和技术负担，甚至最终淘汰出局。”与会人员表示，这些政策的出台，再加上近期中国政府机构的大规模改革，新能源车企将如何应对国家市场监督管理总局和生态环境部的监管，目前仍不明朗，有待进一步观察。

在讨论环节，与会嘉宾积极参与，从新能源汽车制造、行业投融资、消费者趋势等不同的角度对各自最关注的问题及发展预测进行了深入讨论，气氛十分热烈。

On 21 March 2018, L.E.K. Consulting (L.E.K.) and JSC Automotive (JSC) jointly hosted an executive roundtable discussion on how electric vehicle can reshape the automobile industry. Experts from leading OEMs, suppliers, and investment communities attended. During the roundtable, Managing Director of L.E.K. Dr. TENG Yong and Managing Director of JSC Mr. Jochen Siebert gave presentations on “Market Opportunity Assessment of Electric Vehicle Batteries” and “Impacts of Regulations on Powertrain Strategies of OEMs in China”, respectively. Additionally, participants had dynamic exchanges about the current status and future of new energy vehicle industry.



According to Dr. TENG, electric vehicle (EV) battery accounts for 1/3 to 1/2 of total value of EV production and is the core of entire EV value chain. It is predicted that China will account for 60-65% of global production capacity for EV batteries by 2020, becoming world's most critical market. As the market and technology continue to develop, vertical integrations among different sectors become more visible. For instance, battery manufacturers are strengthening their control over upstream resources to hedge price fluctuation and ensure supply. Battery manufacturers are also rapidly expanding their businesses, establishing “mega factories” to raise efficiency and achieve economy of scale. Participants have agreed that industrial consolidation is an overall trend, but it may not be suitable for every enterprise. Companies should take a holistic approach to taking into account factors including financial resources, supply chain coordination, market position, and technological capability.

In China, new energy vehicle (NEV) industry is inseparable from the guidance and support of government policies. This requires enterprises to be able to quickly adapt to changes in policy, consequently, adjusting their business strategy. In 28 September 2017, five of China's ministries jointly announced the launch of “double-point system”, which symbolized a major policy reform for China's NEV industry. JSC stated, “the double-point system aims to build a long-term mechanism to help increase energy efficiency and manage the NEV industry, thus relieving pressure on environment. However, the system would put burdens on small and medium-sized NEV companies due to increased cost and lag in technology.” Participants also suggested that how NEV companies should respond to the recent government reform and the new regulations remain unclear.

During the roundtable discussion, event attendees have actively participated in various discussions, approaching the topics from different perspectives, such as NEV manufacturers, industry investment, financing, and consumer trends. Attendees have also discussed about their concerns and made market predictions, creating a constructive and positive environment platform for industry dialogues.