

Title: Market Structure, Export Models, and Industrial Positioning of
New Energy Vehicles (NEVs) in China

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ABSTRACT

In recent years, the transformation of the global energy structure and the promotion of carbon neutrality targets have accelerated the development of New Energy Vehicles (NEVs) worldwide. As the largest NEV producer and consumer, China has rapidly expanded its exports and gradually established a competitive advantage in the global market. However, this rapid growth is accompanied by multiple challenges, including weak brand recognition, trade and technical barriers, supply chain dependence, and geopolitical risks. This study strictly reviews the development of China's NEV exports from 2018 to 2024 and applies Global Value Chain (GVC) theory to analyze market structure, export models, and industrial positioning. The findings indicate that China's NEV exports exhibit a diversified market pattern, shifting from quantity expansion to value upgrading, with differentiated strategies of “high-end introduction, mid-end penetration, and low-end popularization.” Export models have evolved from traditional vehicle trade to local manufacturing and digital ecosystem expansion, while increasingly complex technical standards and green trade barriers

have imposed stricter compliance requirements. Based on case studies of leading Chinese automakers and comparative analysis, the study proposes optimization paths: (1) adopting region-specific strategies to prioritize key markets; (2) establishing a unified global brand strategy to enhance recognition and trust; (3) accelerating localization of core components and strengthening overseas industrial collaboration; and (4) improving financial risk hedging and policy compliance systems. The research contributes theoretically by constructing a two-dimensional framework of institutional responsiveness–value chain control and introducing a technology–market–institution triple helix model, which expands the understanding of NEV internationalization strategies. Practically, it provides strategic guidance for Chinese NEV enterprises to enhance global competitiveness, transition from scale-based exports to value-based exports, and achieve sustainable development in an increasingly complex international environment.

Keywords: New Energy Vehicles; Global Value Chain; China's NEV exports