China’s economy is undergoing a transformation process. In this lecture we will use the example of China’s New Energy Vehicle (NEV) industry and discuss China’s approach to systematically developed an industry sector. As in 1983 the first Santana, a retired VW car model, was assembled in Shanghai, no one would expect where Chinese automotive industry will stand 40 years later. As the largest car market in the world, China’s NEV shipments reached 6.5 million units in 2022. This is more than 96% growth compared to 2021. NEVs have reached an astonishing penetration of 31% in 2022 from 6% in 2020. In 2022 China has surpassed Germany to become the world’s second-largest car exporter with 3.1 mln exported vehicles. Every fifth exported car was a new-energy vehicle. 77% of the global total cell manufacturing capacity is in China and Chinese companies command 56% of the global EV battery market share. It will address the topic from three different perspectives: 1) How the government policies have systematically promoted and supported the development of the EV sector? 2) How Chinese newcomers/innovators have become leading players in the sector? 3) Which role Chinese consumer have played in the process?

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