第一部分 2020一季度汽车市场的主要特点

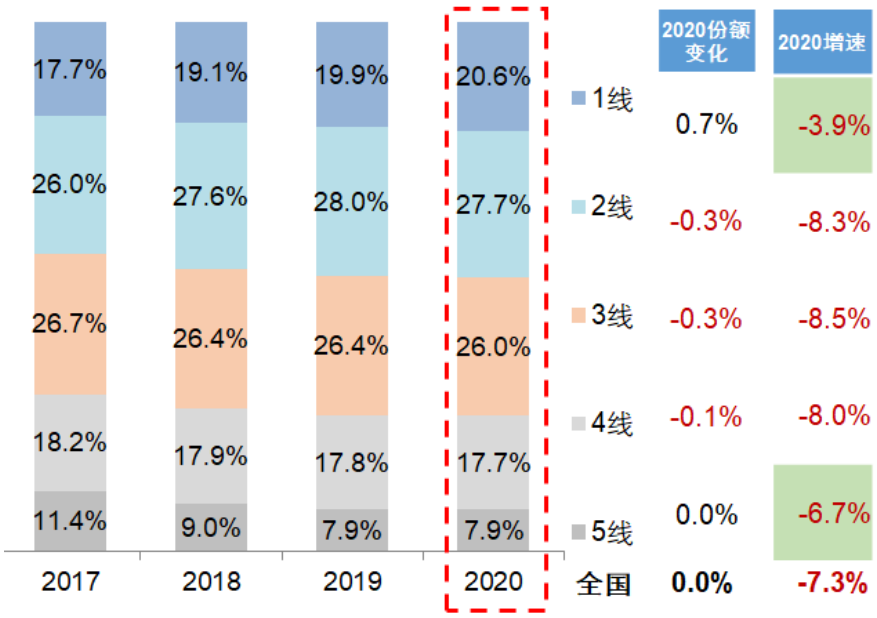
2020

2020

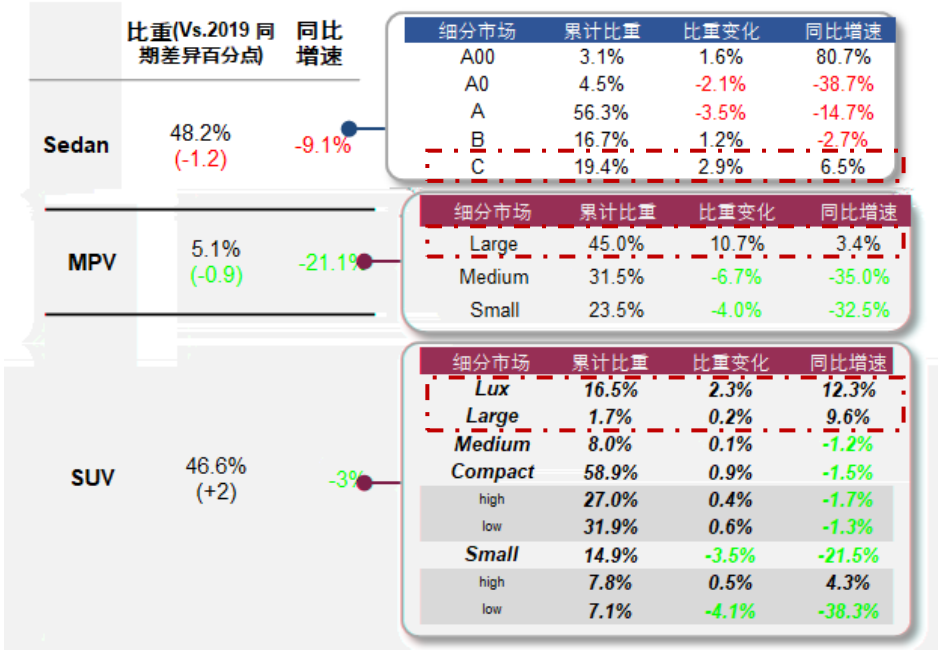
2021

1

不同城市级别乘用车销量份额变化



2020年整体细分市场结构变化

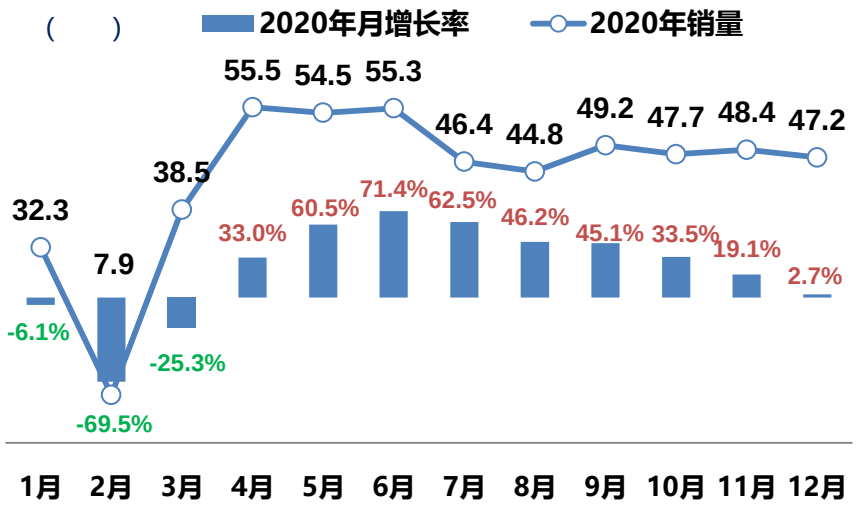


■ 2020 2019 0.7

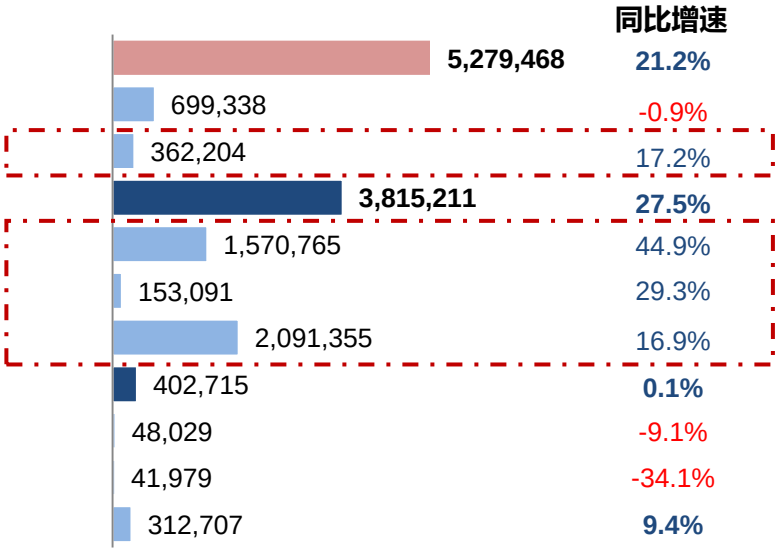
■ 2020 SUV 2 C MPV SUV SUV

2

2020年商用车月度销量走势



2020年商用车国内销量和增幅



■ 2020 527.9 21.2% 2.2%

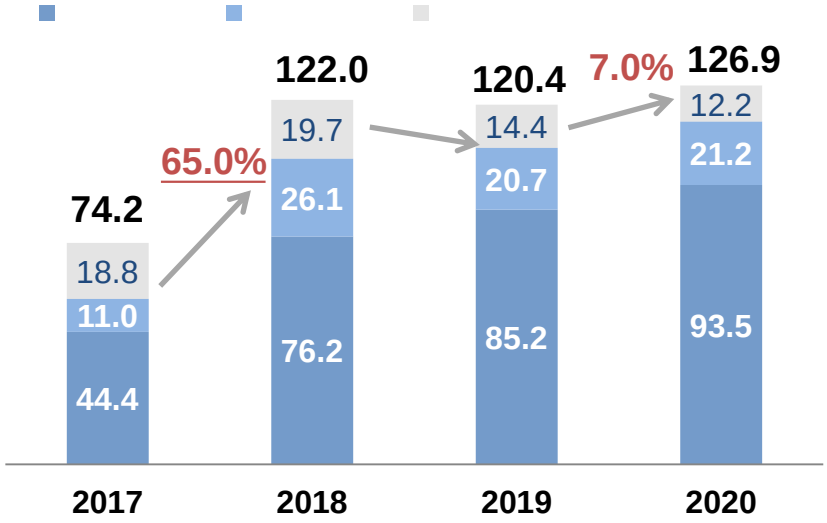
7%

■

5 17.9

3

2017-2020



- 2020 126.9 7% 114.7 9.7%
  12.2 13.2%
- 12 23

2020

2020年公司经营业绩和创新转型

2021

单位：万辆

企业名称	销量完成	同比增减	企业名称	销量完成	同比增减
集团整车销量	560.0	-10.2%	上汽大通	19.3	25.9%
			上汽正大	2.9	23.7%
			上汽印尼	0.7	-71.2%
上汽乘用车	65.8	-2.3%	上汽印度	3.0	82.1%
上汽大众	150.6	-24.8%	上汽依维柯红岩	8.0	37.9%
上汽通用	146.7	-8.3%	上海申沃	0.2	83.1%
上汽通用五菱	160.0	-3.6%	南维柯	2.8	11.3%

1

- MG5 GL8 MINI EV
  MINI EV “ ”
  8
- MPV

2

- “ ”
- “ ”
- “ ” “ ” “ 11 ”

3

- 39 11.3% 1/3,
- 26.7 70%
  4
- 60 9 “ ”
  “ 3 ”

1

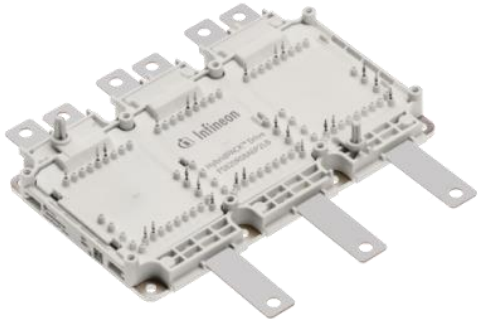
- “ ” R “ ” EUNIQ

- “ ”
  “ ”

2

- EDU G2+ “ ”
- PROME M3
  IGBT IGBT
- Quantum Scape
  “ ”

PROME M3



IGBT

CATL 宁德时代

QuantumScape

3

- MARVEL-R 5G 5G
  “ ” 5 “ ” 2
- “ 4i ” iECU 5G iBOX iEPS iBS
- “ ” AI

i-ECU

i-BOX

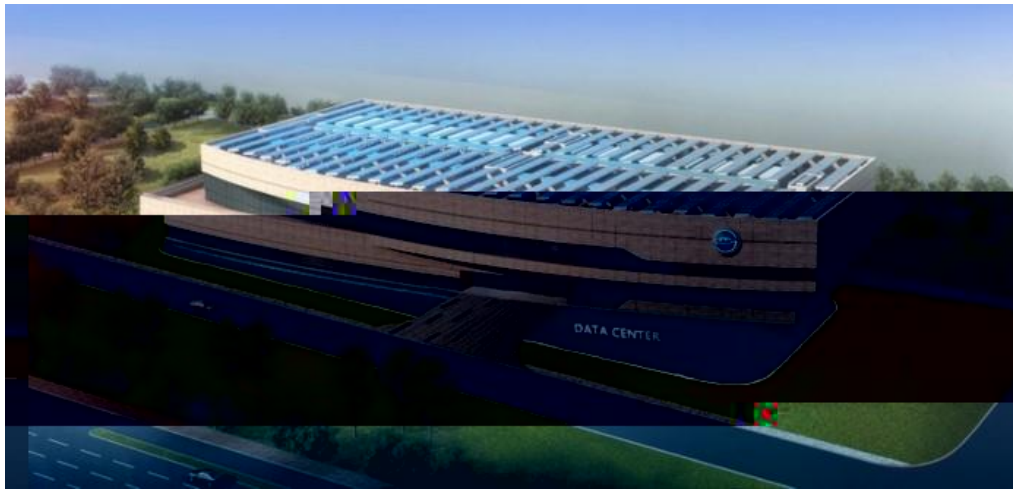
iEPS

iBS

4

- “ ”

- 12 20 MEB

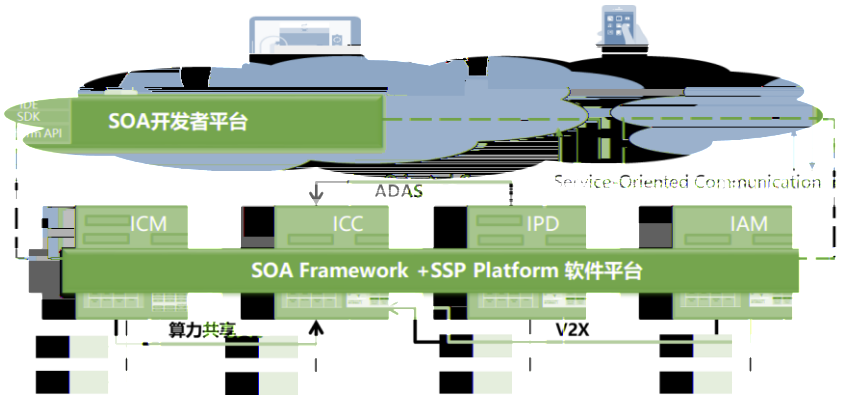


5

- “ ” “ ” SOA “ ”

- SOA

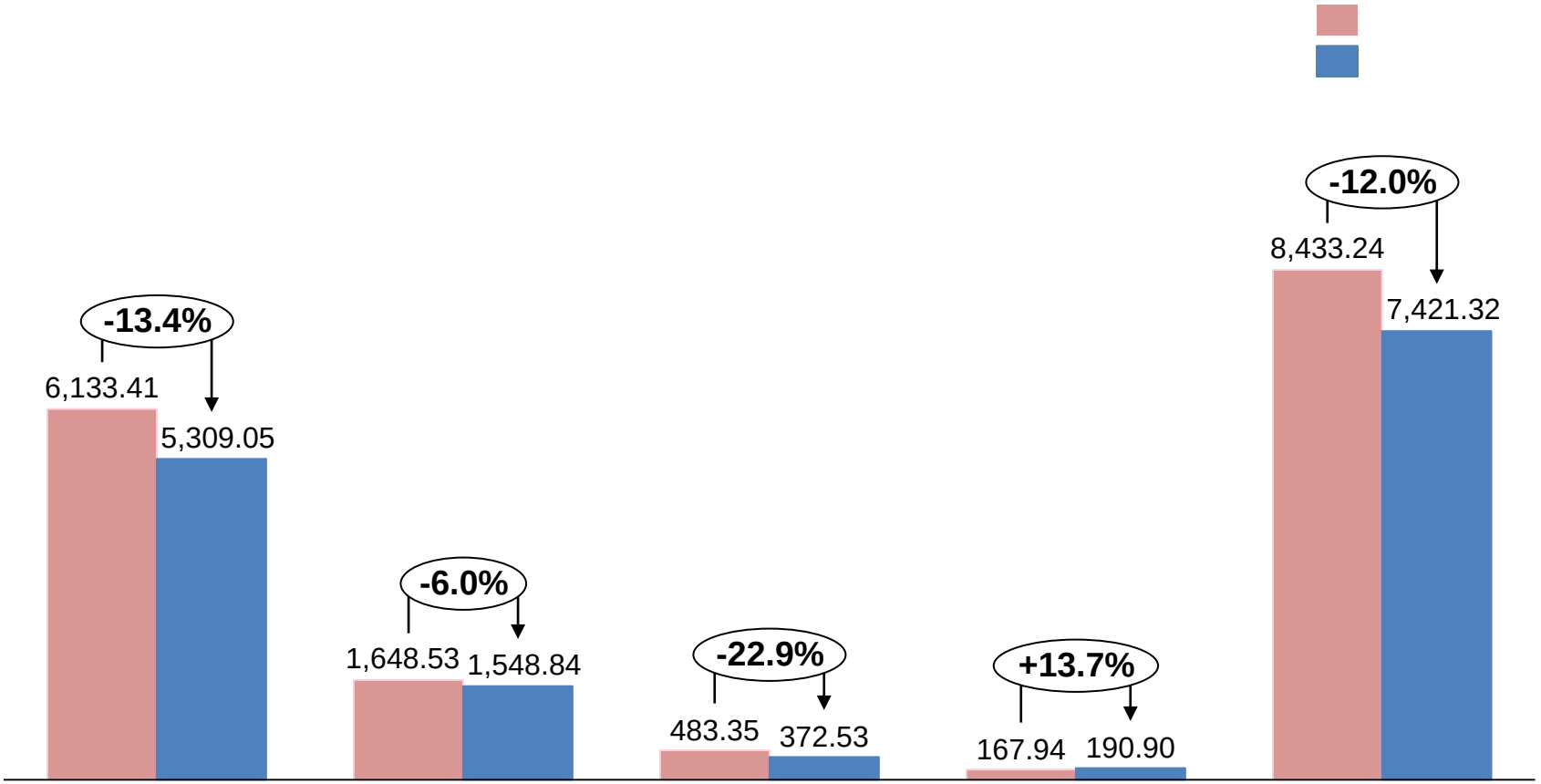
零束 Z-ONE

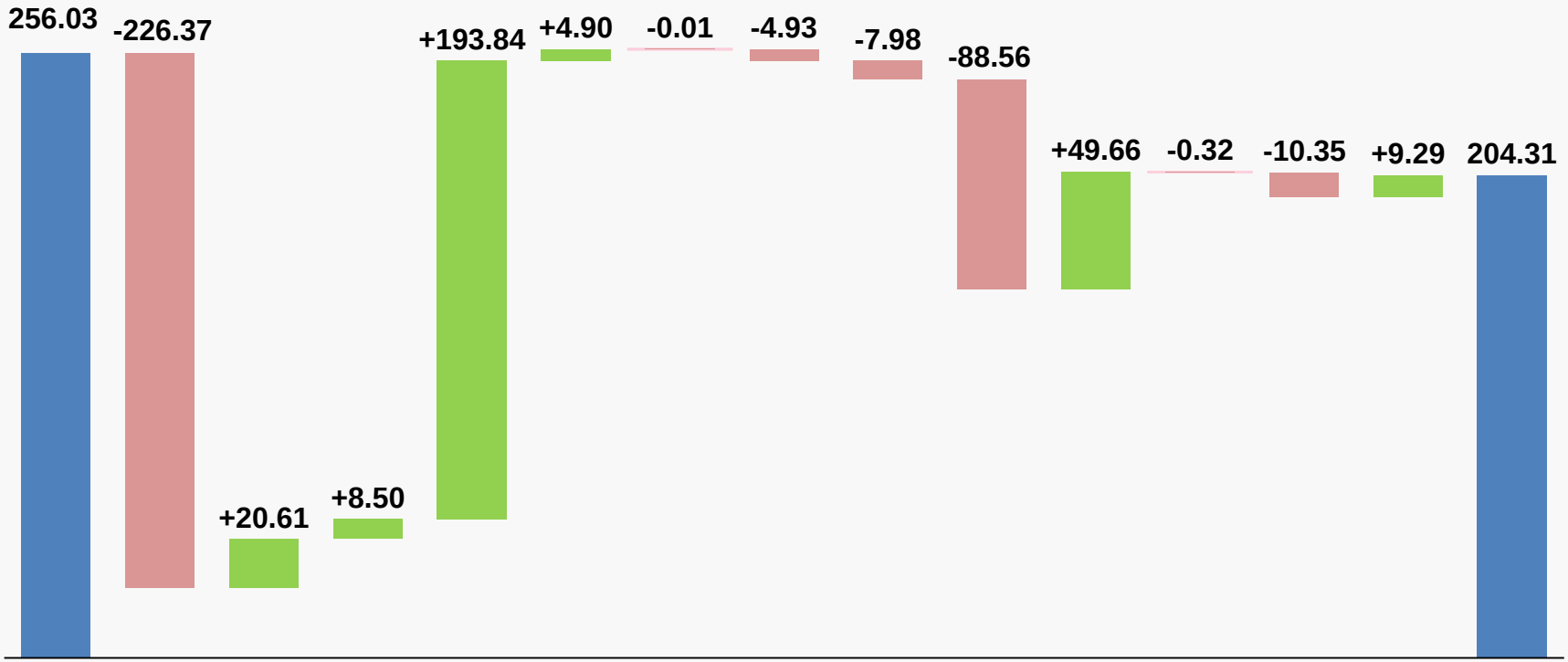


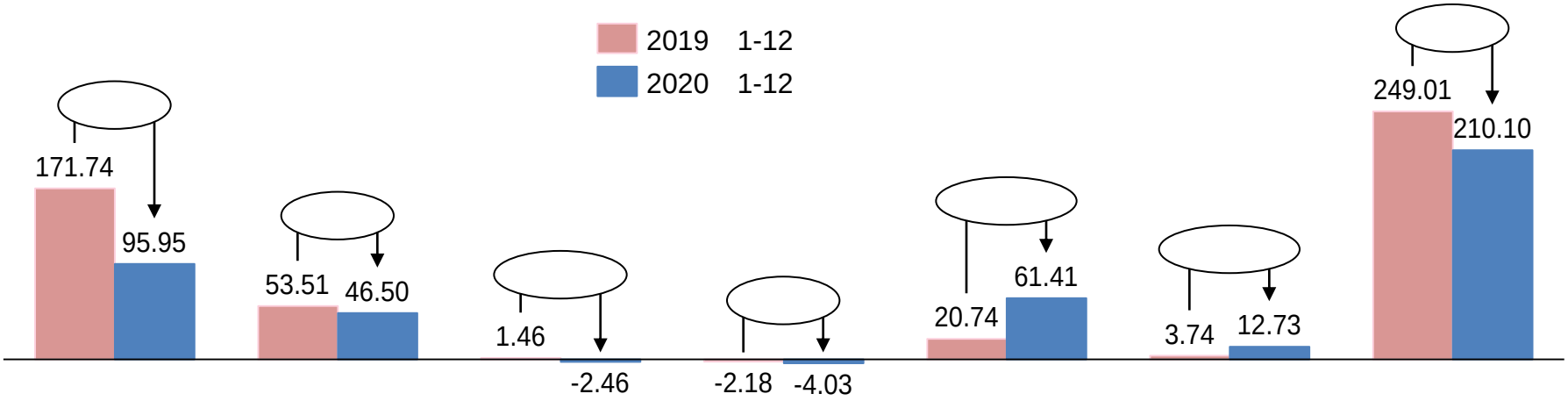
	2020年1-12月	2019年1-12月	同比增减（%）
	560.05	623.80	**-10.22**
	7421.32	8433.24	**-12.00**
	358.92	409.58	**-12.37**
	291.88	352.89	**-17.29**
	204.31	256.03	**-20.20**
	177.44	215.81	**-17.78**
	1.752	2.191	**-20.04**
	1.522	1.847	**-17.60**
	375.18	462.72	**-18.92**
	3.22	3.96	**-18.75**
%	**8.02**	10.53	**减少2.51个百分点**

2020

			%
	9,194.15	8,493.33	**8.25**
	3,100.41	3,008.40	**3.06**
	2,601.03	2,497.02	**4.17**
	22.262	21.372	**4.17**
%	**66.28**	64.58	**1.70**


-13.4%
6,133.41
5,309.05
-6.0%
1,648.53
1,548.84
-22.9%
483.35
372.53
+13.7%
167.94
190.90
-12.0%
8,433.24
7,421.32


256.03
-226.37
+20.61
+8.50
+193.84
+4.90
-0.01
-4.93
-7.98
-88.56
+49.66
-0.32
-10.35
+9.29
204.31



	135.96	**-39.4%**
	95.95	-44.1%
	46.50	-13.1%
	-2.46	-268.6%
	-4.03	-84.7%
	61.41	**196.1%**
	12.73	**240.4%**
	210.10	**-15.6%**

单位：亿元

2020 1-12					
	0.00	36.64	0.00	36.64	0.00
	16.47	113.03	7.72	97.31	24.47
	16.47	**149.67**	**7.72**	**133.95**	**24.47**
%		**2.07%**		**1.85%**	

2020 1-12					
	0.00	22.39	0.00	22.39	0.00
	15.48	26.09	6.85	11.54	23.18
	15.48	**48.48**	**6.85**	**33.93**	**23.18**
%		**8.07%**		**5.65%**	

2020

2020

2021 年汽车市场展望与公司重点工作

机遇

■

■

“ ”

挑战

■

■

2021 2610 3.1%

: 2150 7.3%

460 12.9%

170 34.0%

2021

上汽大众

ID.4X

ID.6

ID.3

Pro

上汽通用

A

上汽乘用车

RX5 MAX

SUV

Marvel R

上汽通用五菱

SUV

智己汽车

2021

1

2

3

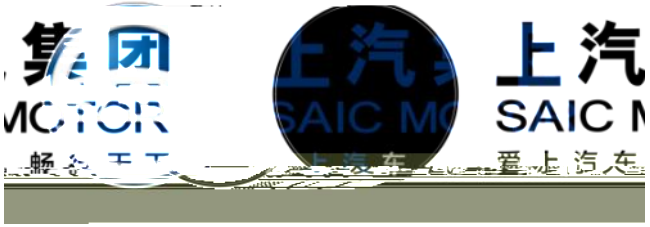
4

5

6

7

617 10.2%



2020

2021 3 26