吉利新能源技术与印尼EV市场展望 GEELY NEV TECHNOLOGY & PERSPECTIVE OF EV IN INDONESIA



杭州2022年亚运会官方合作伙伴 Official Prestige Partner of the 19th Asian Games Hangzhou 2023



吉利集团简介 GEELY GROUP INTRODUCTION

吉利集团历史 DEVELOPMENT MILESTONE OF GEELY GROUP



1986

开始创业 Geely was established **1997**

进入汽车行业 Entered automotive industry

97

浙江吉利控股集团 有限公司成立

2003

Zhejiang Geely Holding Group Co., Ltd (ZGH). was formally founded **2005**

在香港证券交易所 上市(0175.HK)

Geely Auto Listed on the HK Stock Exchange (0175.HK) **2006**

入股英国锰铜公司

Geely Holding became a shareholder in Manganese Bronze Holdings (MBH) **2007**

发表《宁波宣言》 宣布战略转型

Geely issued Ningbo Declaration, began strategic transformation **2010**

收购沃尔沃汽车

Acquired Volvo Car Group **2012**

首次进入 财富世界500强

Geely Holding became a Fortune 500 company **2013**

吉利汽车 欧洲研发中心成立

Established China Euro Vehicle Technology (CEVT)

2016

发布吉利新能源 商用车品牌

发布领克品牌

Geely New Energy Commercial Vehicle launched

LYNK & CO brand launched

2017

收购马来西亚 DRB旗下宝腾汽车 及莲花品牌股份

Acquired a minority stake in PROTON and majority stake in Lotus. **2018**

收购戴姆勒9.69% 汽车 探索 "新四化"

> Acquired 9.69% stake in Daimler, developing CASE technologies

2019

成为 亚运官方合作伙伴

Became the Prestige Partner of the 2022 Asian Games **2020**

与梅赛德斯-奔驰 正式成立smart品牌 全球合资公司

Established smart global joint venture with Mercedes-Benz **2021**

成立 极氪智能科技

Established Zeekr Intelligent Technology **2022**

吉利未来出行星座 首轨九星发射成功

Geely Future Mobility Constellation first nine satellites successfully launched **2023**

全球首创 零碳甲醇 点燃亚运主火炬

Geely's carbon neutral green methanol fuels Asian Games ceremonial torch for the first time in history **2024**

与雷诺正式成立 动力总成技术合资公司 HORSE Powertrain Limited

Geely and Renault officially established HORSE Powertrain Limited



吉利集团业务范围 SCOPE OF BUSINESS OF GEELY GROUP





乘用车

PASSENGER VEHICLES



新能源 商用车 NEW ENERGY COMMERCIAL VEHICLES



科技

TECHNOLOGY



●吉利汽车集团

- 极氪智能科技
- 沃尔沃汽车
- 极星
- 路特斯科技
- 宝腾汽车

Geely Auto Group

- Zeekr Intelligent Technology
- Volvo Car
- Polestar
- LOTUS TECH
- Proton

● 远程新能源商用车集团

远程科技 汉马科技 醇氢科技

 Farizon New Energy Commercial Vehicle Group

Farizon Technology Hanma Technology Chunqing Technology

● 吉利科技集团

时空道宇(商业航天) 沃飞长空(低空出行) 新材料&循环经济

- 广域铭岛 (工业互联网)
- 亿咖通科技 (车载芯片)
- Geely Technology Group

Geespace (Commercial Aerospace) AEROFUGIA (Low-Altitude Flight) New Material & Circular Economy

- GYMD (Industrial Internet Platform)
- ECARX (Car Grade Chips)

- 曹操出行
- 耀出行
- Caocao
- StarRides



吉利汽车国际贸易公司简介 ABOUT GAIC

620+

Total employees

170+

Overseas employees

7

Subsidiaries

1

Joint venture

80+

Markets with dealer

900+

Sales and service network

吉利汽车国际贸易公司 GEELY AUTOMOBILE INTERNATIONAL CORPORATION (GAIC)





吉利印尼 GEELY INDONESIA

吉利印尼

GEELY'S BUSINESS IN INDONESIA

围绕大出行,做强科技生态圈,打造科技护城河 FOCUSING ON MOBILITY, STRENGTHENING ITS TECH ECOSYSTEM, AND BUILDING A TECHNOLOGICAL MOAT

紧紧围绕汽车产业的电动化、 智能化转型,做强科技生态圈, <u>为用户创造超越期</u>待的价值体验。

Focusing closely on the electrification and intelligent transformation of the automotive industry, we will strengthen the technology ecosystem and create value experiences that exceed user expectations.

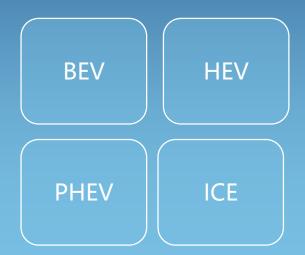
既要保持传统核心能力的优势, 又要开创新的革命性优势, 引领智能电动汽车的未来。

We must both maintain the advantages of traditional core capabilities and create new revolutionary advantages to lead the future of intelligent electric vehicles.

汽车销售、汽车制造、充电基础设施建设、汽车研发、新能源科技、车联网、自动驾驶等业务布局, 是吉利在印尼的主要业务。

Automotive sales, automotive production, charging infrastructure construction, automotive research and development, new energy technology, connected car technology, autonomous driving and etc., are Geely's main business layouts in Indonesia.

提供四种技术路径 FOUR TECHNOLOGICAL PATHS FOR INDONESIAN MARKET





吉利印尼: 实现印尼地产 GEELY IN INDONESIA: STARTING LOCAL PRODUCTION IN 2025



Geely Brand Launching, Jan 2025



Geely Product Launching, IIMS 2025



Geely First Assembly, 2025



Geely at GIIAS, 2025

吉利汽车集团在印尼设立两家子公司,分别为PT Geely Auto Indonesia (销售公司) 和 PT Geely Motor Indonesia (制造公司),正与PT Handal Indonesia Motor合作生产汽车。

Geely Auto Group has two subsidiaries in Indonesia: PT Geely Auto Indonesia (Distributor) and PT Geely Motor Indonesia (Manufacturer), cooperating with PT Handal Indonesia Motor to produce vehicles in Indonesia.

上市的首款车型为BEV车型,吉利EX5,也是首款本地化生产车型;我们在本次GIIAS上亮相了Starray EM-i,星愿和L380三款新车型,未来还将推出更多车型,以满足印尼市场的需求。

This year first model Geely EX5 was launched, and achieve local production; during this GIIAS, we revealed 3 more models, Starray EMi, Xingyuan, and L380, and there would be more with more upcoming models to serve Indonesian market and demands.

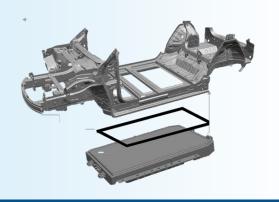


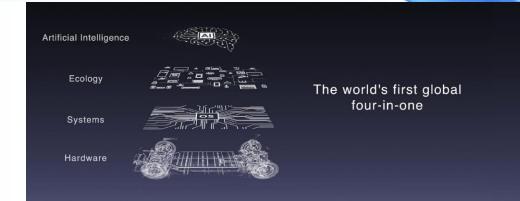
吉利先进技术 GEELY AUTO TECHNOLOGY

GEELY

吉利先进技术: GEA全球智能新能源架构

GEELY AUTO TECHNOLOGY: (GEA) GLOBAL INTELLIGENT NEW ENERGY ARCHITECTURE





吉利在2024北京车展上首次 展示了这一最新技术。 GEELY firstly Introduced this latest technology in Auto China 2024. 在空间设计、智能能源、综合安全、Al智能、驾驶性能等方面均有显著提升。 It offers significant advancements in spatial design, intelligent energy, comprehensive safety, Al intelligence, and driving performance. GEA全球智能新能源架构是全球首个集 "硬件、系统、生态、 AI"四位一体的AI智能架构。 GEA's global intelligent new energy architecture is the world's first fourin-one AI intelligent architecture combining "hardware, system, ecology, and AI". 支持全电动化,提供纯电动、混合动力、增程式、绿色甲醇等多种选择,为用户提供广泛而灵活的动力选择。
It supports full electrification with options such as pure electric, hybrid, range extender, and green methanol, providing users with a wide and flexible range of power choices.



吉利先进技术: 11合1智能电驱系统

GEELY AUTO TECHNOLOGY: 11 IN 1 INTELLIGENT ELECTRIC DRIVE

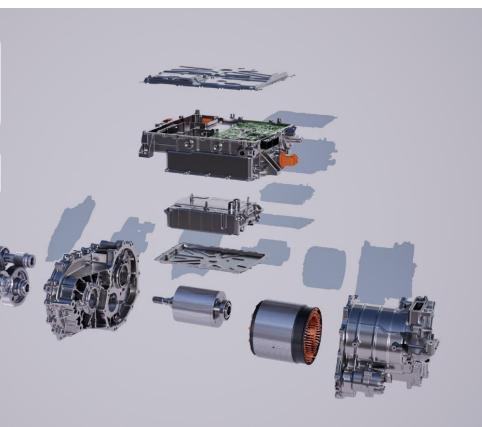
11 合 1 电驱动装置实现了高度集成,首次在EX5上搭载,具有高效率、紧凑的设计、先进的冷却系统和零排放。

11-in-1 electric drive unit achieves high integration, firstly assembled within EX5, with high efficiency, compact design, advanced cooling, and zero emissions.

确保强大、流畅且环保的性能。

Ensuring powerful, smooth, and eco-friendly performance.

- 1. Motor
- Reducer
- 3. MCU Motor Cooling Unit
- 4. VCU Vehicle Control Unit
- 5. HBMS High Voltage Battery Management System
- 6. LBMS High Voltage Battery Management System
- 7. OBC On-Board Charge
- 8. DC/DC DC to DC Converter
- 9. PDU Power Distribution Unit
- 10. TMS Thermal Management System
- 11. GWRC -Geely Wheels Anti-slip Regulation Control



吉利先进技术: 吉利短刀电池

GEELY AUTO TECHNOLOGY: GEELY SHORT BLADE BATTERY



吉利短刀电池 电池安全系统 **GEELY SHORT BLADE BATTERY SAFETY SYSTEM**

吉利短刀电池安全系统是独有的电池安全技术,不仅可以防止电池芯自燃,还可以构建一 套基于电池的"无盲点"安全保护体系,整合架构、车辆、智能控制和云。该安全保护系 统从系统层面解决了电池安全问题,具有8层防护。

Geely Short Blade Battery Safety System is exclusive battery safety technology, which not only prevents spontaneous combustion of the battery core, but also builds a complete set of "no blind spot" safety protection based on the battery, integrating architecture, vehicle, intelligent control, and cloud. The safety protection system solves battery safety issues from the system level with 8 layers of shields.

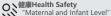
架构Architecture Submarine-like vehicle safety protection.



电芯Battery Cells
"Non-ignition, non-explosion" technology.



安全测试Safety Test All scenarios with extreme conditions battery



electromagnetic safety protection for human body.



智能电源管理BMS Intelligent Management An intelligent doctor for the battery.



电池包PACK "Tank-level" battery structure protection.

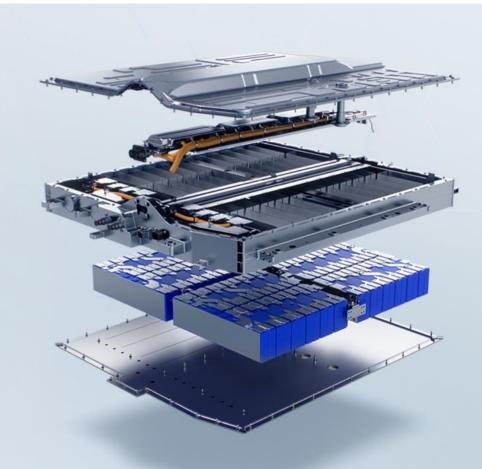


设计**Design** Extremely rigorous design and development system.



大数据Big Data

Cloud-based safety monitoring.

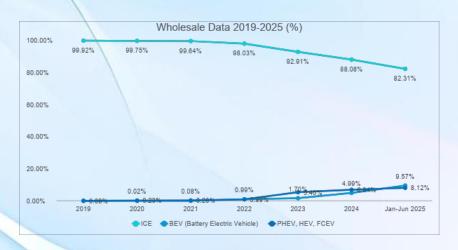




印尼新能源汽车市场展望 NEV MARKET PERSPECTIVE IN INDONESIA



印尼新能源汽车市场现状 NEV AUTOMOTIVE MARKET IN INDONESIA



印尼市场电动汽车市场逐年增长,2024年,尽管总体批发量有所下降,但新能源汽车的批发量增长超过100%

BEV market in Indonesia gradually increased year by year. In 2024 despite the overall wholesale decreased, BEV wholesale increased more than 100%.

2025年中期显示出电动汽车市场的积极增长。

这证实了新能源汽车市场将继续增长的信心。

Mid 2025 showed the positive market growth for EV. This confirms the confidence that the EV market will continue to grow.

WHOLESALES BY CATEGORY IN INDONESIA 2019-2025

Category	2019	%	2020	%	2021	%	2022	%	2023	%	2024	%	Jan-Jun 2025	%
PHEV, HEV, FCEV	812	0.08%	1,199	0.23%	2,518	0.28%	10,354	0.99%	54,307	5.40%	60,040	6.94%	30,438	8.12%
BEV	-	0.00%	125	0.02%	687	0.08%	10,327	0.99%	17,051	1.70%	43,188	4.99%	35,846	9.57%
ICE	1,032,095	99.92%	530,703	99.75%	883,997	99.64%	1,027,359	98.03%	934,444	92.91%	762,495	88.08%	308,456	82.31%
TOTAL	1,032,907	100.00%	532,027	100.00%	887,202	100.00%	1,048,040	100.00%	1,005,802	100.00%	865,723	100.00%	374,740	100.00%

*Courses CAIKINDO 2025



你期望为你的下一辆EV汽车支付多少钱?

Q: How much are you expecting to pay your next EV?



你会购买哪种类型的汽车?
Q: What type of car segment would you buy?

Medium car 73%

Small car 10%

Large car 9%

Mini car 6%

Executive 2%

Luxury car 1%



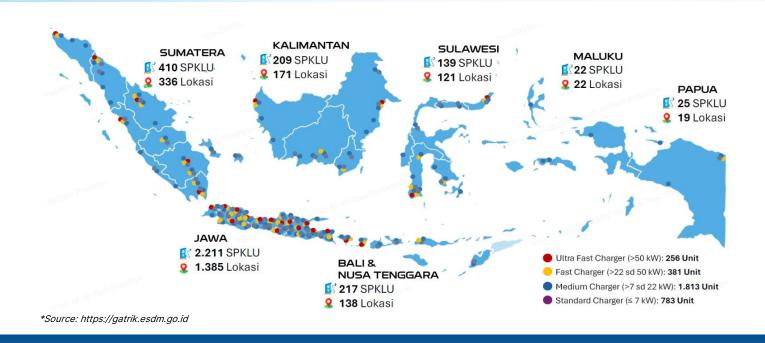
Source: PwC: The Road Ahead: Indonesia's Electric Vehicle Readiness and Consumer Insights 2024

印尼消费者对EV汽车需求 INDONESIAN CONSUMER PERCEPTION OF ELECTRIC CARS 大约27%的印尼EV汽车潜在用户希望EV汽车价格低于4.84亿印尼盾。最大的细分市场(15%) 关注 3.23亿至4.84亿印尼盾的价格范围。这表明市场对经济车型有明显的需求。

Around 27% of Indonesian EV prospects expect their new EV to be under IDR 484 million. Largest segment (15%) focuses on the IDR 323-484 million range. This indicates a clear demand for more affordable models.

大多数消费者更喜欢中型车和SUV类型的电动汽车。 Most consumer prefer medium car and SUV type for their EV.





印尼新能源基础设施建设(充电桩) NEV INFRASTRUCTURE IN INDONESIA (CHARGING STATION) 印度尼西亚共有 2,192 个地点,共计 3,233 个电动汽车充电桩(2024 年 12 月数据) There are 3.233 EV Charger units at 2.192 location in Indonesia (Dec 2024 Data)

印尼国家电力公司计划到 2025 年将印尼的电动汽车充电器数量增加到 6,278 个。 PLN plan to increase the EV Charger unit in 2025 until 6.278 units across all Indonesia.

印尼市场新能源汽车潜力与挑战并存 **CHALLENGES AND POTENTIAL OF NEV IN INDONESIA**

印度尼西亚是世界第四大人口大国,但汽车拥 有率较低 (千人拥车数99)

Indonesia is 4th largest Population in the world with Low Car Ownership Ratio (99 unit/ 1.000 people)

具有丰富的矿产资源,对电动汽 车电池生产友好

Plenty mining resource for EV Battery Production



挑战 (大)



充电站的数量仍需增加

Needs to be increased

The number of charging stations still

鼓励电池在印尼本地化生产 Encourage battery localization in Indonesia

政府政策支持BEV产业的发展 (LCEV, VAT Incentive, BBNKB & PKB Tax Reduction)

(LCEV, VAT Incentive, BBNKB & PKB Tax Reduction)

在市场成熟之前,仍然需要政府在财政方面支 持电动汽车市场的增长。

Still need government long term support related



吉利为印尼提供买得起的好车 Geely: Affordable and Good Car into Indonesia

吉利 EX5 已上市,STARRAY EM-i, 星愿和L380亮相. 更多即将推出的车型... GEELY EX5 LAUNCHED, STARRAY EM-i, XINGYUAN AND L380 FIRST SHOWN. MORE UPCOMING MODELS... 吉利致力于推出基于吉利 GEA 新能源汽车架构的众多车型,吉利 EX5 就是其中之一,凭借新一代智能配置和超越预期的舒适体验,彰显了吉利品牌"高价值"和"高亲和力"的标签。

GEELY EX5 is one of model based on Geely's GEA new energy vehicle architecture. By leveraging its next-generation intelligent configurations and comfortable experiences that exceed expectations, Geely EX5 highlights the brand's "high value" and "highly amicable" labels.

Starray EM-I配备全球最高热效率的引擎,效率达46.5%,进入印尼的首款PEHV车型;星愿是非常适合印尼市场需求的经济性小车,以小车大空间为亮点;这两款车型即将在下半年正式上市。 Starray EM-I is equipped with the world's highest thermal efficiency engine, 46.5%, and is the first Geely PHEV model to enter Indonesia; Star Wish is an economical small car that is very suitable for the needs of the Indonesian market, small car but large space as the highlight; these two models will be officially launched in the second half year.

L380是旗舰高端纯电MPV,在不久将来为印尼客户提供高端的驾驶和乘坐体验。 L380 is a flagship pure electric MPV, providing Indonesia customer with a high-end driving and riding experience in the near future.

快乐人生 吉利相伴

HAPPY LIFE GEELY DRIVE

WEB: WWW.GEELY.CO.ID

IG: Geely Indonesia (@geelyautoindonesia)



