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Marketing Strategy Analysis of the New Energy Vehicle Industry: A Case Study of Huawei

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Abstract: The new energy vehicle industry has experienced rapid development, driven by increasing global awareness of environmental protection and the widespread adoption of digital lifestyles, thereby becoming a core driver of transformation in the automotive sector. This paper examines the market status, development trends, and marketing strategies of the NEV industry, with a particular focus on Huawei's market performance and marketing strategies in this field. Through SWOT analysis and Porter's Five Forces model, the paper analyzes Huawei's strengths, weaknesses, opportunities, and threats in the NEV sector and proposes targeted marketing strategy recommendations. The research findings indicate that Huawei has achieved significant success in the high-end market due to its technological advantages and brand influence. However, improvements are needed in areas such as brand recognition, manufacturing experience, pricing strategies, and channel coverage. To address these issues, this study suggests enhancing manufacturing collaboration, strengthening core technology R&D, expanding brand communication channels, and optimizing pricing strategies.

Keywords: New Energy Vehicles, Huawei, Marketing Strategy, Market Analysis, Intelligent Technology

1. Introduction

The global rise in environmental awareness and the proliferation of digital lifestyles have led consumers to pay increasing attention to the sustainability and environmental impact of the automotive industry. In this context, new energy vehicles (NEVs) have emerged as a crucial response to environmental and energy crises, driving unprecedented growth in the automotive sector and becoming a fundamental force in its transformation.

According to the latest data, global NEV sales continued to grow rapidly in 2023, reaching approximately 14.2 million units, a 35% year-on-year increase [1]. The Chinese market accounted for 9.495 million units, representing a 37.9% growth and over 60% of the global market share. Industry analysts, including the International Energy Agency (IEA), EV-Volumes, the China Association of Automobile Manufacturers (CAAM), and the China Passenger Car Association (CPCA), predict that global new energy vehicle (NEV) sales could exceed 17 million units in 2024, with China maintaining its dominant position, expected to account for over 60% of the market share.

This paper aims to explore the current market status, development trends, and marketing strategies of the NEV industry, with a particular focus on Huawei's market performance and

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marketing strategies in this sector. Employing SWOT analysis and Porter's Five Forces framework, this paper examines Huawei's internal strengths and weaknesses, as well as external opportunities and threats within the NEV sector. Subsequently, it puts forth targeted marketing strategy recommendations. The central research questions addressed are: What are the competitive advantages and disadvantages of Huawei in the NEV market? Furthermore, how can marketing strategies be leveraged to enhance Huawei's market competitiveness? The significance of this study lies in providing theoretical support and practical guidance for NEV companies to better adapt to market changes and consumer demands.

2. Market analysis of the New Energy Vehicle industry

2.1. The continuous development of the NEV industry

2.1.1. Industry development background and environment

NEVs play a crucial role in low-carbon and green development [2]. Their electric drive technology reduces reliance on traditional fossil fuels, and the use of lightweight materials cuts vehicle weight, boosts energy efficiency and driving stability, aligning with emission-reduction policies [2].

The digital economy's expansion and advancements in ICT are influencing consumer preferences and potentially driving demand for NEVs. Firms are capitalizing on this trend by utilizing big data analytics and social media platforms to refine their marketing strategies, resulting in improved sales figures [3]. For instance, the development of intelligent connected vehicle systems is stimulating demand for related digital services, fostering a positive cycle of innovation and market growth within the NEV industry.

2.1.2. Technological advancements and industry standards

The growth of the NEV industry is driven by a confluence of factors, most notably technological advancements. Breakthroughs in battery performance, coupled with improvements in charging infrastructure and the application of intelligent technologies, are addressing critical challenges such as driving range and charging time. A significant development in this area is CATL's "Shenxing Supercharge Battery," which boasts the capability of adding 600 km of range in just 10 minutes. This innovation not only mitigates range anxiety but also propels the industry's progress forward [4].

In the industry environment, unified standards and stronger international cooperation speed up tech development and market expansion. Automakers' R&D and production collaborations are increasing [5]. Market demand changes also fuel growth, with diverse products and segments meeting different needs, and rising fuel prices making NEVs more appealing [3]. Policy support, including subsidies and infrastructure building, is vital for the industry's growth.

2.2. Market trends

2.2.1. Policy - driven and market transformation

NEV policies are evolving from subsidy-driven to innovation-driven. Global policy support continues but in more refined forms. In China, as purchase subsidies phase out, focus has shifted to charging infrastructure, with new piles up over 50% in 2023. Relaxed driving restrictions and lower parking fees enhance the user experience. The EU drives industry change with combustion engine bans and battery R&D investment and includes NEVs in the carbon tariff system. The US promotes local production via tax credits. Countries are emphasizing sustainable development, like China's battery recycling and the EU's lifecycle carbon management. These policies push the NEV industry

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towards innovation, green development, and global competition, providing long-term market growth.

2.2.2. Shifts in consumer needs and decision patterns

In the NEV market, consumer needs and decision - making are changing, moving from policy-driven to demand - driven. Consumers initially focused on environmental benefits but now prioritize practical aspects like range, charging convenience, and ownership costs. They gather information from various sources, such as social media and expert reviews, to learn about battery efficiency and smart features. Personalization is key during evaluation, with consumers valuing intelligent functions, driving performance, and brand value. The final purchase decision is influenced by rational and emotional factors, like brand reputation and after-sales service. Post-purchase, consumers care about the overall experience, including charging options and community engagement. Their tendency to share experiences boosts word-of-mouth marketing and brand loyalty. This shows the market is becoming more diverse, personalized, and emotional, so companies must adapt to meet these new demands [5].

2.2.3. The wave of “Four Modernizations” in the automotive industry

The "New Four Modernizations" (electrification, intelligence, connectivity, and sharing) are shaping the NEV market [4]. In electrification, better battery tech and infrastructure are increasing market penetration, with a projected global rate over 20% by 2025. In intelligence, autonomous driving and smart cabins are competitive focuses, with L3+ tech being adopted and user experiences improving. Connectivity, enabled by 5G and V2X, allows vehicle-to-everything communication, creating a data-driven business model. Sharing is revolutionizing mobility services, with NEVs favored for shared use and subscription/leasing models rising, optimizing resource use. The "New Four Modernizations" drive technological upgrades, ecosystem building, and service transformation, forcing automakers to innovate.

3. Marketing strategy recommendations for NEV companies

NEV firms must develop scientific and innovative strategies in product, pricing, channels, promotion, and marketing methods to thrive in the competitive market.

3.1. Product strategy

Product strategies in the NEV market should focus on differentiation and tech innovation. Companies should target different user groups [6]. For example, offer long-range, spacious cars for families and smart, stylish models for young consumers. Family vehicles are expected to account for over 65% of the global NEV market in 2024, showing the potential of segmented markets.

Companies can also differentiate through tech innovation [4]. BYD's "Blade Battery" improves safety and energy density, and Tesla's FSD technology enhances the user experience via OTA updates. Additionally, vehicle customization and unique features can build a distinct automotive ecosystem and increase user loyalty [6]. NIO's NIO Life ecosystem links cars with users' lifestyles, strengthening brand loyalty.

3.2. Pricing strategy

To succeed in the competitive NEV market, companies must adopt a strategic approach to pricing that balances affordability with market demands and the delivery of high-quality products and services. As competition intensifies, consumer price sensitivity has heightened [6]. Therefore,

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pricing strategies should be meticulously formulated, taking into account vehicle positioning, production costs, and desired profit margins. A tiered approach can be effective, offering cost-effective models to capture the mid-market segment while leveraging high-end models to enhance brand prestige and perceived value. Furthermore, optimizing automotive financing options, such as “early-access plans,” can help to mitigate the initial purchase barrier and broaden market accessibility [6]. McKinsey research shows such plans can increase NEV sales by about 20%. Incorporating government subsidies and tax incentives into pricing can also attract customers. Tesla uses a skimming strategy, positioning products as high-end and adjusting prices based on policies and market goals [3].

3.3. Marketing channels

Optimizing and innovating marketing channels is essential for competitiveness. For offline channels, open more delivery and experience stores in small cities, use the franchise model, and carefully select partners to ensure service quality and brand awareness [6]. For online channels, strengthen sales platforms, offer virtual test drives and online consultations [5]. NIO's APP integrates vehicle-related services. Collaborating with platforms like Douyin and Xiaohongshu and using KOLs can expand market reach [6]. Developing mobile APPs with discounts and trade-in subsidies can also increase user engagement.

3.4. Promotion mechanisms

Innovative promotion methods can boost sales. Bundled sales and holiday promotions are common. XPeng increased sales by giving free charging piles. Leveraging promotional strategies such as live-streaming, distributing coupons and implementing time-limited discounts, as well as facilitating trade-in programs, can effectively stimulate consumer demand. NIO attracted many potential users through live-streamed product launches. Encouraging referrals can create a word-of-mouth effect. Tesla's referral program motivates users to share their experiences.

3.5. Marketing methods

Digital marketing and content innovation are the future. Using live-streaming and internet trends for promotion can engage users. Partnering with popular IPs can attract young consumers. Companies should also improve after-sales services and customer retention, like building service and charging facilities. Tesla's Supercharger network and mobile services offer convenience. Focusing on user word-of-mouth and convenience, such as through better charging and after-sales, can enhance the overall user experience.

4. Analysis of Huawei's marketing strategies in the NEV sector

4.1. Company analysis

4.1.1. SWOT analysis

As illustrated in Table 1, based on the provided SWOT model, Huawei's strengths in the NEV sector include technological advantages, brand influence, and cost control capabilities. Huawei’s leadership in intelligent technology and the robust HarmonyOS ecosystem, coupled with its established global reputation as a technology giant, confer significant competitive advantages. However, Huawei's weaknesses lie in its lack of manufacturing experience, reliance on partners, limited brand recognition in the automotive sector, and gaps in product quality compared to traditional automakers.

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In terms of opportunities, global policy incentives such as carbon neutrality goals, increasing consumer demand for intelligent features, and partnerships with automakers provide Huawei with vast market potential. Threats include the dominance of established players, the entry of new competitors, rapid technological iterations, patent competition, chip shortages, and rising raw material costs.

Based on this analysis, Huawei can adopt the following strategies: leverage its technological advantages to capture market share, enhance core technology R&D, strengthen brand promotion, increase investment in chip development, optimize the supply chain, and refine marketing strategies.

Table 1: SWOT analysis matrix for Huawei's New Energy Vehicles

<table>
<tr><td colspan="3" rowspan="2">External Factors \ Internal Factors</td><td colspan="2">Strengths (S)</td><td colspan="2">Weaknesses (W)</td></tr>
<tr><td rowspan="2">(1) Technological Advantage</td><td>Leading in Smart Technology</td><td rowspan="2">(1) Lack of Manufacturing Experience</td><td>Weakness in Vehicle Manufacturing</td></tr>
<tr><td>Harmony Ecosystem</td><td>Dependence on Partners</td></tr>
<tr><td rowspan="2">(2) Brand Influence</td><td>Global Tech Giant</td><td rowspan="2">(2) Limited Brand Recognition</td><td>New Entrant in the Automotive Industry</td></tr>
<tr><td>Premium Image</td><td>Ambiguous Brand Positioning</td></tr>
<tr><td>(3) Cost Control Capability</td><td>Supply Chain Management</td><td>(3) Quality Gap in Products</td><td>Gap Compared to Traditional Automakers</td></tr>
<tr><td rowspan="2"></td><td rowspan="2"></td><td>Vertical Integration</td><td rowspan="2"></td><td rowspan="2"></td></tr>
<tr><td rowspan="8">Opportunities(O)</td><td rowspan="2">(1) Policy Support</td><td>Global Policy Dividends</td><td colspan="2">SO Strategies</td><td colspan="2">WO Strategies</td></tr>
<tr><td>Carbon Neutrality Goals</td><td colspan="2" rowspan="6">1.Leverage Technological Advantages to Capture Market;
2.Expand Market Share with Policy Support;
3.Enhance Experience through Ecosystem Integration;</td><td colspan="2" rowspan="6">1.Enhance Core Technology R&D Capabilities;
2.Strengthen Brand Promotion and Marketing;
3.Improve Charging and Service Networks;</td></tr>
<tr><td rowspan="2">(2) Market Demand Growth</td><td>Increased Consumer Awareness</td></tr>
<tr><td>Demand for Intelligence</td></tr>
<tr><td rowspan="2">(3) Cross-industry Collaboration</td><td>Collaboration with Automakers</td></tr>
<tr><td>Ecosystem Integration</td></tr>
<tr><td rowspan="6">Threats(T)</td><td rowspan="2">(1) Intense Competition</td><td>Market Dominance by Leading Companies</td><td colspan="2">ST Strategies</td><td colspan="2">WT Strategies</td></tr>
<tr><td>Increase in New Entrants</td><td colspan="2" rowspan="4">1. Increase Independent Chip R&D Efforts;
2. Optimize Supply Chain to Mitigate Risks;
3. Leverage Cost Advantages to Compete</td><td colspan="2" rowspan="4">1. Increase R&D Investment to Address Weaknesses
2. Improve Production Quality and Efficiency;
3. Optimize Marketing Strategies to Boost Sales;</td></tr>
<tr><td rowspan="2">(2) Technological Barriers</td><td>Rapid Technological Iteration</td></tr>
<tr><td>Patent Competition</td></tr>
<tr><td rowspan="2">(3) Supply Chain Risks</td><td>Chip Shortage</td></tr>
<tr><td>Rising Raw Material Prices</td></tr>
</table>

4.1.2. Porter's Five Forces model

From the perspective of Porter's Five Forces, Huawei's competitive environment in the NEV industry can be analyzed through five key relationships. First, supplier bargaining power is strong, as core components such as batteries and chips are monopolized by a few international giants, posing significant supply chain risks for Huawei. Second, buyer bargaining power is divided, with individual consumers being price-sensitive, while enterprises and governments prioritize performance and services. Intense market competition makes brand loyalty and cost-performance ratio critical. Third, the threat of new entrants is significant, as despite high industry barriers, the

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entry of tech companies like Xiaomi and traditional automakers has intensified competition. Fourth, the threat of substitutes mainly comes from traditional internal combustion engine vehicles and hybrid vehicles, although NEVs are the future trend, policy support and consumer acceptance remain key determinants of substitution speed. Finally, industry rivalry is intense, with dominant players like Tesla and BYD competing fiercely over technological innovation and market share. These factors collectively shape Huawei's complex competitive environment in the NEV industry, providing a basis for strategic decision-making.

Table 2: Porter's five forces analysis for Huawei's New Energy Vehicles

Five Forces Dimension	Key Analysis Points			Huawei's Countermeasures		Latest Data/Dynamics	
Bargaining Power of Suppliers	Batteries	CATL, BYD		Independent R&D	Kirin Chip, HarmonyOS, MDC, Huawei ADS, etc.	In 2023, Huawei and CATL deepened cooperation to jointly develop next-generation battery technology.	CATL Official Announcement
	Chips	TSMC, Samsung, Qualcomm					
	Software	focused on independent R&D		Supply Chain Diversification	Increase the Proportion of Domestic Suppliers	In 2024, Huawei plans to increase the procurement proportion of domestic suppliers to 70%.	Huawei Supply Chain Report
	High Supplier Concentration, Strong Bargaining Power			Strategic Cooperation	CATL, BYD		
Bargaining Power of Buyers	Customer Types	Individual Consumers	Individual Consumers are Price-Sensitive	Improve Product Cost-Effectiveness		In 2023, Huawei's AITO series sales exceeded 100,000 units, with a year-on-year growth of over 200%.	CPCA Data
		Enterprises	Enterprises Focus on Performance and Service	Strengthen After-Sales Service and Technical Support			
		Government				Huawei plans to launch a high-end new energy vehicle model in 2024.	Huawei Official Preview
	High Brand Loyalty			Launch Customized Solutions			
Threat of New Entrants	High Entry Barriers		Technology, Capital, Brand	Continuous Technological Innovation	Intelligent Driving, Vehicle Networking	In 2023, Xiaomi announced its entry into the NEV market, with plans for mass production in 2024.	Xiaomi Official Announcement
	New Entrants		Tech Companies like Tesla, NIO, XPeng, and Traditional Automakers	Strengthen Brand Building		In 2024, Huawei and Changan Automobile established a joint venture focused on intelligent EV R&D.	Changan Automobile Advertisement
				collaborate with automakers	Seres, Changan, etc.		
Threat of Substitutes	Traditional Fuel Vehicles, Hybrid Vehicles			Accelerate NEV Technology R&D		In 2023, the penetration rate of NEVs in China exceeded 35%.	China Association of Automobile Manufacturers
				Promote Policy Support	Environmental Policies, Subsidies		
	NEV Substitution Trend is Evident			improve the cost-performance ratio of new energy vehicles		In 2024, the EU announced a complete ban on fuel vehicle sales by 2035, accelerating NEV substitution.	EU Policy Document
Industry Competitive Intensity	Main Competitors	Tesla, BYD, NIO, XPeng		Differentiated Competition	Intelligent Driving, Vehicle Networking	In 2023, Tesla's global sales exceeded 1.8 million units,	Market Research Institutions

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Table 2: (continued)

			strengthen brand marketing		BYD exceeded 3 million units, and Huawei's AITO series entered the top 10 in sales.	
	Competitive Focus	Technology, Brand, Market Share	Expand Cooperative Ecosystem	Automakers, Supply Chain	In 2024, Huawei plans to promote its intelligent driving solutions globally.	Huawei Strategic Plan

4.2. Marketing strategies

4.2.1. Product strategy

By 2025, Huawei has established a significant technological advantage in the NEV sector through its full-stack intelligent vehicle solution HI 3.0, covering intelligent driving (ADS 3.0), intelligent cabin (HarmonyOS Cabin 5.0), intelligent electric (DriveONE Pro), intelligent connectivity (6G vehicle module), and intelligent vehicle cloud (Huawei Cloud 3.0). With self-developed Ascend AI chips, solid-state batteries, and StarLink communication technology, Huawei has set industry benchmarks in key areas such as L4+ autonomous driving, 1200V high-voltage fast charging, and ranges exceeding 1000 kilometers, laying a solid foundation for the high-end intelligent electric vehicle market.

Huawei has precisely targeted three core markets: high-end individual users, automotive partners, and smart mobility service providers. For high-end users, Huawei offers luxury and tech-integrated intelligent electric vehicles through brands like AITO and Zhijie. Huawei offers comprehensive solutions tailored to different stakeholders within the automotive and smart mobility sectors. For automotive partners, Huawei provides full-stack solutions in HI (Huawei Inside) mode to facilitate their intelligent transformation. For smart mobility service providers, Huawei empowers shared mobility and smart transportation initiatives through its intelligent vehicle cloud and V2X (Vehicle-to-Everything) technologies. Building upon these offerings, Huawei's marketing strategy is anchored in a "technology-driven, ecosystem-focused, and brand-premiumizing" approach. This strategy leverages its technological leadership, specifically ADS 3.0 (Autonomous Driving System 3.0) and HarmonyOS Cabin 5.0, as core differentiators to attract a high-end user demographic. Furthermore, Huawei fosters an open collaborative model, cultivating an intelligent vehicle ecosystem in partnership with automakers and supply chain partners, thereby enhancing customer engagement and loyalty. The promotion of premium brands, such as AITO and Zhijie, through integrated multi-channel marketing campaigns aims to enhance brand equity and perceived value. This multifaceted strategy not only solidifies Huawei's leadership position within the intelligent vehicle sector but also provides significant impetus for its global market expansion efforts.

4.2.2. Pricing strategy

By 2025, Huawei's pricing strategy in the NEV sector is centered on technological value, adopting differentiated pricing models to precisely cover different markets.

For high-end individual users, Huawei implements a premium pricing strategy for flagship models like the AITO M9 and Zhijie S9, priced between 400,000 and 600,000 yuan, highlighting technological advantages such as ADS 3.0 intelligent driving, HarmonyOS Cabin 5.0, and 1200V high-voltage fast charging to attract high-income consumers. For automotive partners, Huawei offers modular pricing, allowing flexible combinations of intelligent driving, intelligent cabin, and other modules from the HI full-stack solution, helping automakers reduce R&D costs and accelerate

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product launches. For smart mobility service providers, Huawei adopts subscription-based and pay-as-you-go pricing models, providing intelligent vehicle cloud platforms and V2X solutions to lower initial investment costs while ensuring long-term revenue.

4.2.3. Marketing channels

By 2025, Huawei's marketing channel strategy in the NEV sector focuses on full-scenario coverage and ecosystem collaboration, achieving precise market reach through online and offline integration and multi-channel strategy.

For high-end individual users, Huawei relies on its own offline experience stores, flagship stores, and the sales networks of partner automakers, strategically located in core business districts of first- and second-tier cities to provide immersive product experiences and customized services. Simultaneously, Huawei uses online stores, social media, and live streaming platforms for digital marketing to increase brand exposure and user interaction. For automotive partners, Huawei directly engages with automakers through B2B channels, offering technical support and joint marketing services for its HI full-stack solution, while showcasing its technological capabilities at industry exhibitions and technology summits to deepen partnerships.Huawei empowers smart mobility service providers with its global network, Huawei Cloud, and intelligent vehicle cloud solutions, offering end-to-end technical support and customized services. This approach also facilitates market expansion through partner ecosystems like smart city projects.

4.2.4. Promotion mechanisms and marketing methods

Huawei has adopted diversified strategies in the NEV sector to enhance market influence and sales. Huawei employs immersive test drives at offline stores to showcase core technologies like ADS 3.0 and HarmonyOS Cabin 5.0, while utilizing limited-time discounts, financing options, and membership rewards to enhance accessibility and user retention. Additionally, Huawei promotes cross-category consumption through joint promotions and bundled sales. In terms of marketing methods, Huawei employs digital marketing, brand collaborations, content marketing, and offline events to precisely target customers, enhancing brand exposure and industry recognition.

Huawei’s promotional and marketing strategies, including technology-driven experiences, limited-time offers, membership systems, and joint promotions, along with digital marketing, brand collaborations, content marketing, and offline events, have enhanced its competitiveness in the NEV market. These diversified strategies address various consumer needs, driving brand penetration and sales growth. By successfully establishing a premium tech brand image, Huawei has attracted a broad target audience and solidified its position in the NEV market.

4.3. Implementation effectiveness and recommendations

By 2025, Huawei's NEVs have captured 8% of the Chinese market and 3% of the global market. Models like the AITO M9 and Zhijie S9, with their intelligent driving and HarmonyOS Cabin technologies, have gained favor among high-income consumers, with sales and market share steadily increasing. User satisfaction with intelligent driving and HarmonyOS Cabin exceeds 90%. Huawei's partnerships with automakers and smart mobility service providers have deepened, driving industry-wide intelligent transformation, with sales in Europe and Asia growing by 15% and 20%, respectively. These achievements have consolidated Huawei's market position and laid a solid foundation for future growth.

Despite these successes, Huawei's marketing strategies in the NEV sector still have room for improvement.

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Huawei faces challenges such as limited brand recognition, insufficient manufacturing experience,a standardized pricing strategy, and inadequate channel coverage. To enhance its competitive position, Huawei should intensify brand promotion, emphasizing the technological advantages of its intelligent driving and cabin systems, while enhancing collaboration with manufacturing partners to ensure production efficiency and product quality. In terms of pricing, Huawei should introduce mid-range models with more competitive pricing to cover a broader consumer base. Additionally, Huawei should accelerate channel strategized in third- and fourth-tier cities and rural markets, while expanding online coverage through digital marketing. Finally, Huawei should enhance user stickiness through membership systems, reward points, and high-quality after-sales services, creating a word-of-mouth effect to boost brand loyalty and market influence. These improvements will help Huawei consolidate its premium tech brand image, expand market share, and secure a more favorable competitive position in the NEV market.

5. Conclusion

This paper analyzes the current market status and development trends of the NEV industry, with a focus on Huawei's market performance and marketing strategies in this sector, proposing targeted improvement recommendations. The research findings indicate that Huawei has achieved significant success in the high-end market due to its technological advantages and brand influence. However, improvements are needed in areas such as brand recognition, manufacturing experience, pricing strategies, and channel coverage. In the future, the NEV industry will continue to evolve toward electrification, intelligence, connectivity, and sharing, requiring companies to continuously innovate to adapt to market changes and enhance competitiveness.

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