

# China School Bus Industry Report, 2012

Jul. 2012

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

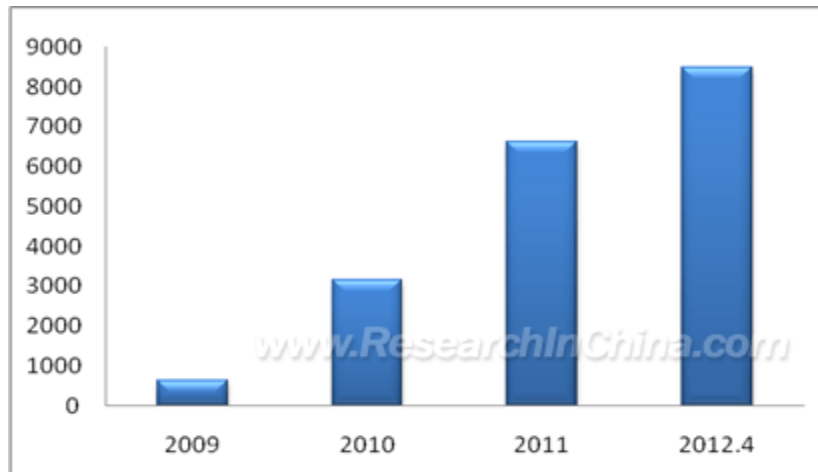
Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## Abstract

A series of school bus crashes in the past two years have aroused wide concern over safety of school buses. From March to April of 2012, the State Council, the General Administration of Quality Supervision, Inspection and Quarantine of the P.R.C. and the Standardization Administration of the R.R.C. issued Regulation on School Bus Safety and technical standards to regulate the funding source, operation supervision and technical norms of school buses, etc. Meanwhile, local governments also started to check and control the operation of school buses. So the school bus industry in China will usher in a phase of standardized operation.

According to the Ministry of Education, the number of vehicles carrying students to and from school amounts to 285,000, of which 29,000 vehicles meet the standards of school bus, and the ownership of special school buses reaches only 8,300, far below than that in the developed countries such as the U.S. and Japan. The formulation of Regulation on School Bus Safety promotes local governments and schools to intensively purchase special school buses. In accordance with relevant statistics, the sales volume of school buses surged 109.91% YoY to 6,608 in 2011, and the figure even approached 8,500 in the first four months of 2012, which indicates that the school bus market rapidly picks up in China. Based on the multiple factors including the carrying ratio of primary and junior high school, and kindergarten students, the number of students and school bus passengers and crew, we estimate that the demand gap of school buses will hit 420,000 in the five years to come (2012-2016).

## Sales Volume of School Buses in China, 2009-Apr. 2012



Source: ResearchInChina <China School Bus Industry Report, 2012>

Presently, Yutong Bus enjoys the lion's share in Chinese school bus market. As of June 2012, Yutong had successively developed 18 types of special school buses covering such specifications as body length of 6.6-10m and seating capacity of 24-68, and is a manufacturer boasting the most abundant school bus portfolio. Yutong Bus sold a total of 1,717 special school buses in 2011 and the sales volume got to 2,231 in Q1 2012.

Baoding Changan Bus, the second largest school bus producer in China, focuses on cab-over-engine products, with body length ranging from 5 m to 11 m. In 2009-2011, the company's school bus sales maintained the average growth rate of 133.17%. In Q1 2012, the sales volume of school buses reached 763.

HIGER BUS Company Limited is a rising star in the school bus market. The company is one of the major bus makers in China and engages in the production of large, medium and light buses. Its school bus products mainly target at foreign markets and have been exported to Qatar and UAE, etc. The company has started to attach great importance to domestic market since 2012. As of April 2012, the company made up 6.5% market share in school bus area.

**It is in the report that covers the followings:**

- ◆ Major policies and technical standards concerning school bus market in China;
- ◆ Market size and market structure of large, medium and light buses in China;
- ◆ The comparison of school bus ownership and operation between China and foreign countries;
- ◆ Sales of school buses in China, covering sales volume, price, region and specifications, etc.;
- ◆ The competitive landscape of school bus market in China;
- ◆ The forecast of demand for school buses in China;
- ◆ Analysis on Chinese school bus producers in terms of operation, output and sales volume of products and product specifications, etc.

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