

**China Financial Leasing Industry
Report, 2013**

Jan. 2013

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.

INFORMATION SOURCES

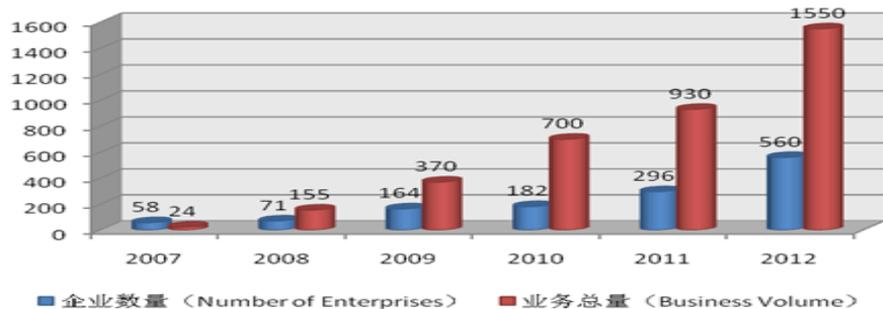
The primary information sources include Company Reports, China Customs, and National Bureau of Statistics of China etc.

Abstract

In 2012, the financial leasing industry of China presented remarkably rapid development, with business turnover reaching RMB1.55 trillion, an increase of about RMB620 billion (66.7%) from RMB930 billion at the end of 2011.

By the end of 2012, there had emerged more than 560 financial leasing companies in China, an rise of nearly 300 over the previous year, of which, the number of foreign-funded ones grew by 250 to 460 compared with 210 in 2011, more than doubled, mainly thanks to the release of the Catalogue of Industries for Guiding Foreign Investment (2011 Revision) in 2011, which adjusted foreign-invested financial leasing companies from the restricted to the allowed.

Enterprise Number and Business Volume of China Financial Leasing Industry, 2007-2012 (Unit: RMB bn)



Source: China Leasing Blue Book;

ResearchInChina China Financial Leasing Industry Report, 2013

Concerning the application fields, the aviation financial leasing industry still remained rapid development in 2012. As of September, 2012, there were 1,907 cargo transport aircrafts of Chinese aviation companies, 60% of which were obtained through financial and operating leases.

In 2012, the growth rate of construction machinery industry slowed down, which exerted the amounting pressure on operational risks and payment collection for financial leasing enterprises. In H2 2012, construction machinery manufacturers - Zoomlion Heavy Industry Science & Technology Development Co., Ltd. and Sany Heavy Industry Co., Ltd respectively raised the down-payment percentage of financial leasing business, XCMG Construction Machinery Leasing Co., Ltd set up a telephone collection team to control operational risk.

Affected by the downturn in the global shipping market, in 2012 the ship financial leasing market structure also experienced silent changes. Bank-based financial leasing companies are narrowing the shipping business, of which, the ship leasing business of Minsheng Financial Leasing Co., Ltd. (MSFL) has witnessed constant shrinkage since the second half of 2012. Due to lack of lease, MSFL has announced no more investment in shipping assets in the first

future. At the same time, non-bank-based financial leasing companies are expanding the shipping business progressively, and foreign financial leasing companies are itching to try, as well.

Seen from corporate competitive landscape, listed companies have successively set foot in the financial leasing business in 2012, which may prick up market competition. Since Dec., 2012, China-Kinwa High Technology Co., Ltd, Anyang Iron and Steel Group Corporation, Chengdu Xinzhu Road & Bridge Machinery Co., Ltd., Zhejiang Jingong Science & Technology Co., Ltd, Zhangjiagang Furui Special Equipment Co., Ltd., Yunnan Chihong Zinc & Germanium Co., Ltd., etc. have in succession announced the development of financial leasing business.

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