

**China Financial Leasing Industry
Report, 2014**

May 2014

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, and National Bureau of Statistics of China etc.

Abstract

Since 2013, China's financial leasing industry has continued to maintain rapid growth, with total turnover reaching approximately RMB2.35 trillion as of the end of March 2014, an increase of RMB250 billion from RMB2.1 trillion at the end of December 2013. The number of enterprises totaled 1,137, an increase of 111 ones compared with 1,026 at the end of 2013. Among them, the number of foreign leasing companies grew faster, with the total number amounting to 990, an increase of around 110.

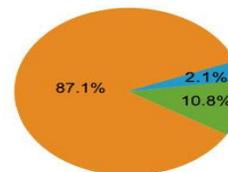
In terms of leasing business penetration of key application areas, financial lease presented the highest penetration rate in construction machinery industry, at nearly 16%, which was mainly because that machinery manufacturers were leasing companies and a larger portion of professional leasing companies were involved and therefore had remarkable financial advantages. In 2013, financial leasing turnover from engineering machinery exceeded RMB100 billion.

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Key Operating Data of China Financial Leasing Industry (as of Mar. 2014)

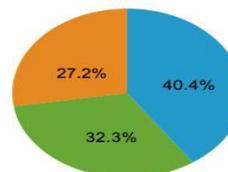
Financial Leasing Enterprises Domestic-funded Leasing Enterprises Foreign-funded Leasing Enterprises

Number of Enterprises



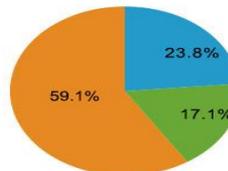
Total number of enterprises reaches **1,137** including **990** foreign-funded leasing companies.

Business Volume



The business volume of financial leasing companies represented by banking leasing enterprises holds the largest share, reaching RMB**950** billion, up **10.5%** from that at the end of last year.

Registered Capital



Enterprises' registered capital hit RMB**334.9** billion of which nearly **60%** was held by foreign-funded leasing companies.

Source: China Financial Leasing Industry Report, 2014

What comes next is the financial leasing of aviation industry, whose leasing business penetration stood at roughly 10%. With capital advantages, banking leasing companies had a good performance in this field. Take ICBC Leasing for example. As of the end of 2013, the company's aircraft leasing assets exceeded RMB40 billion, with the airplanes delivered 151, surpassing CDB Leasing as the company with largest aircraft leasing asset value.

Since 2013, medical device and automotive financial leasing industries with lower leasing business penetration have grown at the fastest pace, which is mainly because of the vigorous development of this industry and the involvement of professional leasing companies. Since its layout in medical industry in 2001, Far East Horizon had operated a total of nearly 3,500 financial leasing projects in medical industry by the end of June 2013.

And what about automotive financial leasing industry? Not only professional financial leasing companies, but also financial leasing companies—mainly including banks, car makers and dealers were involved in this field. As of the end of 2013, CDB Leasing, one of banking financial leasing companies, had cooperated with some car makers that cover first and second-class commercial vehicles, with the leasing business transaction volume from commercial vehicles reaching RMB10.3 billion and business volume from leasing approximately RMB4.4 billion. Furthermore, the number of vehicles involved exceeded 30,000 units, and the number of leaseholders was close to 9,000.

China Financial Leasing Industry Report, 2014 by ResearchInChina focuses on the followings:

- ✘ Business environment of financial leasing industry in China, including policy environment, economic environment, social environment as well as the development of global financial leasing industry;
- ✘ Operation of China's financial leasing industry, including the enterprises' type and number, business transactions, registered capital, earnings, regional distribution, as well as the problems in the industry development;
- ✘ The key application areas of China's financial leasing industry, including aviation, shipping, engineering machinery, medical devices, printing equipment, rail transportation equipment, telecommunications and IT industry, security and protection industry, radio and television industry, and automobile industry;
- ✘ 11 financial leasing companies, 7 domestic-funded leasing companies and 6 foreign-funded leasing companies in China, including operation, financial leasing and financing channels of the enterprises, etc.

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