



China Commercial Vehicle Industry Report, 2014-2017

Oct. 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

According to China Commercial Vehicle Industry Report, 2014-2017, sales volume of China's commercial vehicles is estimated to register a CAGR of 6% in 2014-2017, and will reach 5.12 million in 2017. The development of commercial vehicle industry is closely related to macro economy. In 2013, the growth rate of China's GDP fell to 7.7%, while commercial vehicle market experienced slow growth at the same time, with output and sales volume increasing by 7.6% and 6.4%, respectively.

In view of market segment, the truck market remain depressed due to slower pace in infrastructure construction and project construction. In 2013, output and sales volume of trucks in China were 2.705 million and 2.726 million separately, edging up 3.3% and 2.8% year-on-year. It is expected that the truck market will maintain a moderate growth trend over the next few years because of continuous structural adjustments of China's macro economy.

Driven by positive factors like tourist bus and school bus, passenger car market saw rapid development in recent years. In 2013, output and sales volume of passenger car in China reached 483,000 and 477,000, rising by 13.4% and 12.0% from a year earlier respectively.

It is projected that spurred by new energy bus and school bus, the bus market will keep growing fast, with an estimated average growth rate of around 10% in 2014-2017.

With respect to market pattern, there were a total of 73 companies selling commercial vehicles in China in 2013, among which the top ten in terms of sales volume were Beiqi Foton, Dongfeng Motor, JAC Motors, Jinbei Automobile, FAW Group, Jiangling Holding, SAIC-GM-Wuling, Sinotruk, Nanjing Auto and Chang'an Automobile, with a combined market share of 71.6%.

In bus field, large bus has a higher market concentration than medium-sized bus and light-weight bus. China's large bus market is dominated by Jinlong Bus and Yutong Bus, with combined market share of 65.2% in this segment in 2013.

In truck field, market concentration of heavy-duty truck is the highest. Major companies include Sinotruk, Beiqi Foton, Dongfeng Motor, JAC Motors and Shaanxi Automobile, with their combined market shares up to 83.8% of the segment in 2013.

China Commercial Vehicle Industry Report, 2014-2017 includes six chapters and 126 charts, involving the followings:

Overview of commercial vehicle industry (including macro-economy and relevant policies)

- Sales volume of commercial vehicles in China (including output and sales volume of the overall market and all segments in 2009-2013, and output and sales volume forecasts in 2014-2017)
- Export and import markets of commercial vehicle (including import and export volume and value, and data of importers and exporters)
- Competition pattern of commercial vehicles (types of overall market and segments, ranking of companies by sales volume, market share and comparison of finance among key companies)
- Operation of ten Chinese commercial vehicle producers (covering corporate profile, financial indicators, revenue structure, sales volume, ranking and market share of commercial vehicle, major clients and performance forecast)

1. Overview of Commercial Vehicle Industry

- 1.1 Definition and Classification
- 1.2 Policies, Laws and Standards

2. Production and Sales

- 2.1 Production
- 2.2 Sales

3. Import and Export

- 3.1 Fluctuation in Import, Increase in Export
- 3.2 Decline in Import of Bus and Truck
- 3.3 Increase in Export of Bus, Increase First and Then Decline in Export of Truck
- 3.4 Major Import and Export Regions and Countries
- 3.5 Trade Balance

4. Industry Competition

- 4.1 Concept and Measurement of Market Concentration
- 4.2 Concentration of Commercial Vehicle Market
- 4.3 Comparison of Finance

5. Key Companies

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 - 5.1.2 Financial Indicators
 - 5.1.3 Operating Revenue Structure

- 5.1.4 Automobile Production Capacity
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- 5.1.6 Major Clients
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