



China Financial Leasing Industry Report, 2015

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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

Although China's economic growth saw continuous downturn, China financial leasing industry has maintained fast growth since 2014, with total turnover approximating RMB 3,420 billion as of the end of March 2015, a rise of about RMB 220 billion over that at the end of 2014. The number of enterprises totaled 2,661, an increase of 459 compared to the end of 2014. The number of foreign leasing companies enjoyed the fastest growth and increased by 420 to 2,440.

With respect of application segments, aviation financial leasing business presented continuous growth. As of the end of Sep. 2014, there were nearly 2,200 passenger planes in Chinese civil aviation industry, of which 1,500 ones were from leasing (including 40% of financing leasing). This was mainly due to continuous business expansion and promotion of cross-border leasing products of banking leasing companies.

As of the end of 2014, ICBC Financial Leasing owns and manages over 420 planes, with customers covering more than 50 front-line airline companies. It has delivered 216 planes (including 213 commercial planes delivered for operation). The company's aircraft leasing assets exceeded RMB 70 billion. China Development Bank Leasing owns 43 airline company customers (including 15 domestic tenants and 28 overseas tenants) distributed in 23 countries and regions. CDB Leasing establishes business management platforms respectively in Shenzhen (headquarter), Shanghai Free Trade Zone, Tianjin Bonded Area, and Ireland.

Since 2014, financial leasing of shipping industry, second only to bank lending, has become the second largest ship financing channel. In 2014, Minsheng Financial Leasing, Bank of Communications Financial Leasing and CSSC Leasing accumulatively built more than 4 million dead weight tons of ships and contributed a large sum of orders to China's shipbuilding industry with innovative financial model.

Key Operating Data of China Financial Leasing Industry (As of Mar. 2015)

	Total Number of enterprises	Business Volume (RMB Billion)	Registered Capital (RMB Billion)
Financial Leasing Enterprises	30	1,390	108.2
Domestic-funded leasing Enterprises	191	1,070	94
Foreign-funded leasing Enterprises	2,440	960	610
Total	2,661	3,420	812.2

Due to continuous downturn in shipping industry and poor performance of enterprises, banking financial leasing companies are more and more prudent when it comes to expanding shipping business, and focus more on advanced shipbuilding industry business. Take ICBC Financial Leasing for example. Its shipping business' main investment objects are marine engineering ships, assets from which took up 15% of total shipping business assets in 2013 and further to 51% in 2014.

China Financial Leasing Industry Report, 2015 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, construction machinery, medical devices, printing equipment, railway transportation equipment, telecommunications and IT industry, security and protection industry, radio and television industry, and automobile industry;
- ➔ 10 financial leasing companies, 8 domestic-funded leasing companies and 7 foreign-funded leasing companies in China, involving operation, financial leasing and financing channels , etc.

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