

# China Bus Industry Report, 2016-2020

Jul. 2016

## **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

Affected by multiple factors like the slowdown in macro-economic growth, the slashed local fiscal expenditure and the substitution effect of high-speed rail passenger transport, Chinese bus market declined during 2015-2016. In 2015, China produced 590,900 buses (including chassis) and sold 595,400 ones, down 2.69% and 1.90% year on year respectively. In the first half of 2016, the bus output and sales volume amounted to 255,700 and 253,800 respectively, down 9.44% and 9.48% year on year correspondingly.

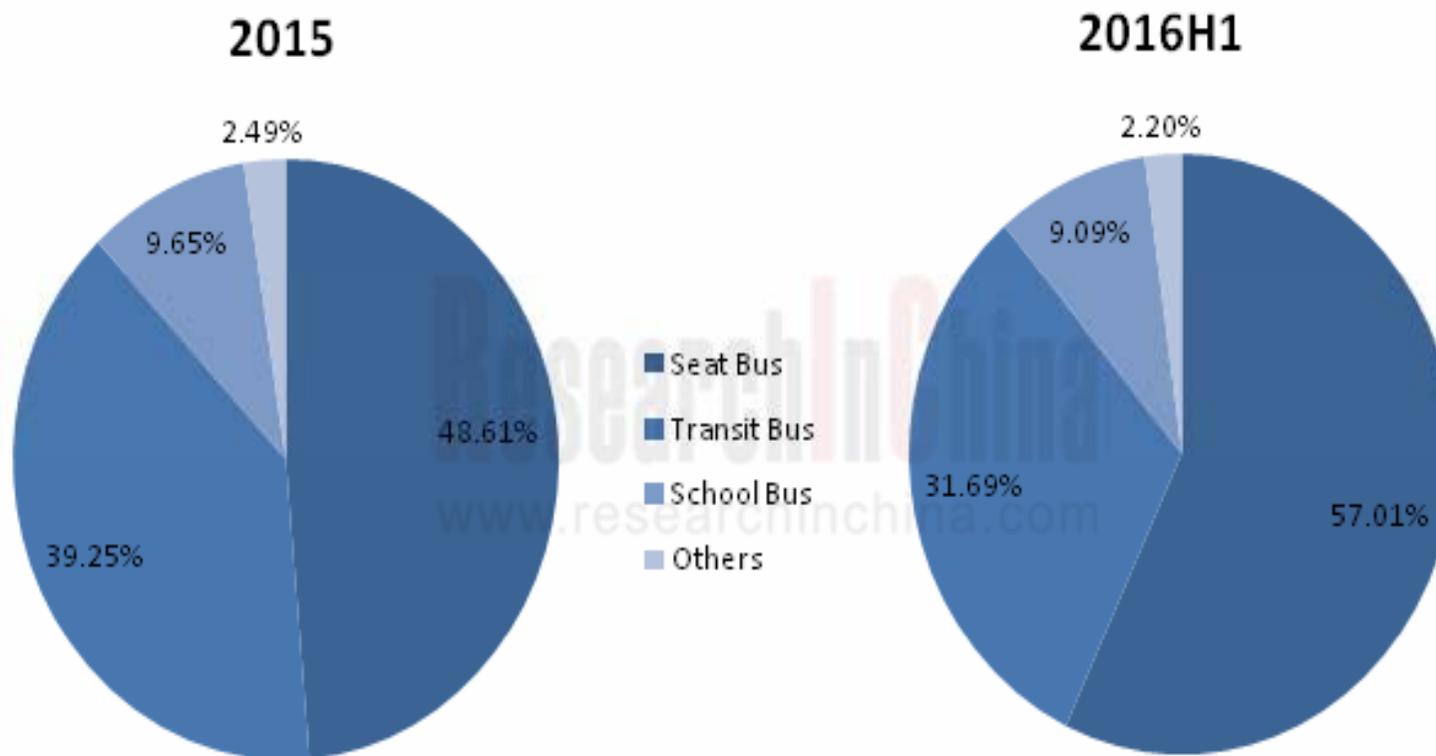
The market segments feature the followings:

**Among seat buses, tour buses and light seat buses witness rapid growth.** In 2015-2016, the construction of the high-speed railway network led to the contraction of medium and long-distance bus lines and departure frequencies as well as slow growth of medium and large seat buses. At the same time, the tourism market propelled the demand for tour buses which maintained fast growth. Thanks to the national policy on the development of urban and rural integrated transportation, the demand for medium and short-haul light seat buses commuting between urban and rural areas jumped, with the growth rate of as high above 40% in 2015.

**Transit buses benefit from the fast-growing new energy.** In 2015-2016, transit buses grew radically under the boost of new energy vehicles. From January to May of 2016, China's output of new energy buses (BEV + PHEV) totaled 25,997, a year-on-year surge of 125.65%. Wherein, the output of BEVs (battery electric vehicles) soared by 225.74% year on year, becoming the absolute mainstream. In the future, new energy transit buses will be the highlight of the bus market as the new energy trend becomes more obvious.

The rising demand for new energy buses has stimulated Chinese bus companies to promote such buses. As the largest large and medium-sized bus manufacturer in China, Yutong Bus sold 20,446 new energy buses in 2015, including 13,885 battery electric buses and 6,561 plug-in buses. In addition, the company obtained China's first fuel cell bus production qualification in 2015, which may facilitate its leading-edge development in the field of fuel cell buses in the future.

## Chinese Bus Market Structure, 2015-2016



Source: ResearchInChina

Xiamen King Long Motor Group started relatively late in new energy buses, but its three wholly-owned subsidiaries: Higer Bus, Xiamen King Long United Automotive Industry, and Xiamen Golden Dragon Bus hold adequate technical reserves and have robust competitive strength. In 2015, Xiamen King Long Motor Group produced a total of 19,435 new energy buses, and sold 18,434 ones consisting of 12,323 battery electric buses (skyrocketing 1041% year on year) and 6,111 plug-in buses (up 165% year on year). The Group's new energy bus battery and motor systems are purchased from main suppliers such as CATL, Microvast and Jing-Jin Electric Technologies (Beijing), while its electronic control systems are the result of its independent R & D and design.

The report mainly deals with the following:

- Market size, market structure, competitive landscape, import and export, and trends of China's overall bus market (including chassis);
- Market size, market structure, and competitive landscape of large, medium, and light bus market in China;
- Market size, market structure and status quo of seat buses, transit buses, school buses, natural gas buses and other market segments in China;
- Market Size, competitive landscape, related policies, technology roadmap, and industrial investment of new energy buses in China;
- Telematics and active safety technology development of China bus industry;
- China's bus industry chain, including the supply relationship of main upstream spare parts (transmission, wheel hub, and new energy batteries) and downstream market demand;
- Development of Chinese bus manufacturers, including their financial data, bus production and sales, new energy bus business, capacity, cost structure, latest developments, etc.

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