China Electric Bus Industry Report, 2017-2020

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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.

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Abstract

Amid new energy industrial policy turbulence in 2016, subsidy cheating verification started at the beginning of the year, China Vehicle Technology Service Center re-examined the first three batches of promotion directory in April and published the fourth and fifth batches in succession till December, resulting in centralized releases of early demand accumulation in Q4. In 2016, China produced a total of 135,000 new energy buses, up 20% year on year. As subsidies will decline in 2017, new energy bus market in Q4 2016 may have overdrawn part of the sales.

In terms of the output structure, 115,600 battery electric buses were produced in 2016, accounting for 85.5% of new energy bus production; by vehicle length, battery electric buses are predominantly 8-10m and above 10m.

Compared with conventional fuel buses, new energy buses boast big advantages in cost saving, energy conservation and emission reduction. In recent years, technical conditions and market environment of new energy bus have tended to be mature with national policies for fostering new energy buses, making sales shoot up. The penetration rate of new energy bus increased rapidly from 4.3% in 2013, 10.0% in 2014, to 38.3% in 2015, 45.8% in 2016.

Although subsidy cheats exerted great influence on electric bus market in 2016, the city bus market saw stable growth of electrification and limited downside potential because of its properties, such as market system, environmental protection effect and fixed vehicle scheduling. In 2016, penetration rate of new energy buses was approximately 80.4% in bus sales but remained low in stock market. Currently, China achieves bus ownership of roughly 580,000 units and a 28% new energy bus penetration rate in stock market. In consideration of decreasing subsidies for fuel buses and increasing subsidies for electric buses as well as an obvious positive externality of new energy buses to municipal administration and environment, the electrification trend in bus is expected to last and the penetration rate of new energy bus in stock market will be further improved.

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China Association of Automobile Manufacturers (CAAM) forecasts China's new energy vehicle sales volume will hit 800,000 in 2017, of which, passenger vehicles account for roughly 70% (up from 65% last year). Based on this, new energy commercial vehicle sales volume will reach 240,000 in 2017, including 180,000-190,000 new energy buses. In view of bus market increment from urbanization as well as the penetration in highway bus market after new energy technology maturation and cost reduction, China's new energy bus sales volume is predicted to exceed 250,000 by 2020.

The report highlights the following:

◆Significance of electric bus popularization, status quo, and trends at home and abroad;

◆Mainstream technical routes of electric bus in China, status quo and trend of bus battery, motor and electronic control industry chain;

◆Major subsidies for purchase (tax reduction & exemption and fiscal subsidies) and for use as well as popularization policies in China's electric bus industry;

◆China's electric bus production, sales and future trend, competition pattern, market share, sales forecast, investment and capacity of major electric bus enterprises;

◆China's electric city bus market sales volume, penetration rate trend, subsidy policies, etc.;

◆Technical level, production and sales scale, capacity and development planning of 12 major electric bus manufacturers in China.

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