China Electric Bus Industry Report, 2018-2021

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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

Due to rushed installation in 2016, the output of electric buses fell by 22.2% over the previous year in China, to 105,000 units in 2017. Higher threshold of new energy bus subsidy policies greatly affected the Chinese new energy bus market in the first half of 2017. The market picked up in the second half of the year because of clearer trend in policy adjustment. Besides subsidies, there are more policy supports for new energy vehicle, and the demand from city bus and coach going electric will continue to expand over the next couple of years. However, the new energy bus market is still dominated by city bus and logistics vehicle, and other passenger transport markets remain to be tapped.

The new subsidy policy, introduced in Feb 2018, put forward higher requirements on Ekg compared with the 2017 version. The subsidies for plug-in electric bus were halved on the basis of the 2017 level.

Output mix: In 2017, battery electric bus output was 88,556 units, down 23.4% year on year and accounting for 84.2% of total new energy buses; 8-10m and 10m-and-above battery electric bus models prevailed.

About 76% of city bus sales in 2017 were new energy ones, but its penetration in bus stock market in tier-three or four cities remains low. Given that the country lowers subsidies for fuel-powered city-bus year after year and gives more support for electric city bus and the positive externality of new energy city-bus towards municipal administration and environment is distinct, it is expected the trend of city-bus going electric will continue and the penetration of new energy buses in existing city buses will be lifted further. Provinces like Guangdong, Hebei, Henan, Shaanxi and Hainan have rolled out plans to help implementation of new energy city bus promotion programmes.

Against the backdrop of subsidy transition, new energy bus shined in the first quarter of 2018, with single-season sales totaling 8,607 units, a year-on-year upsurge of 320.7%, including 8,198 city buses or 95.2%, up 308.67% over the same period of last year, largely thanks to extension of the 2017 subsidy policy. Following the end of transitional period, the subsidies come down but technical requirements grow stricter. Moreover, new capacity built in the past few years under the stimulation of policies will go into production. As a result, output and sales of new energy buses are unlikely to grow remarkably; the industry will be further reshuffled, with small new energy bus producers utterly relying on subsidies to be phased out from the market.

Given increments contributed by urbanization to the city bus market, especially the new energy city bus increments in tier-three or four cities, as well as higher penetration in intercity coach market following maturity of new energy technology and cost reduction, the output and sales of new energy buses are expected to surpass 150,000 units in 2021.

China Electric Bus Industry Report, 2018-2021 focuses on the followings:

◆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 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 sales, penetration, subsidy policies, etc.;
Level of technology, scale of production and sales, capacity and development planning of 12 major electric bus manufacturers in China.

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