China Bus Industry Report, 2019-2025

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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

China as the world's largest bus manufacturer supplies nearly 50% buses in global market. In 2018, the country manufactured 489,000 buses, 7.0% less than in the previous year. China's bus industry has made changes over the years, with output sliding at an annual average rate of 6.1% between 2015 and 2018. The downtrend in output will continue in 2019, due to lack of market dynamism. The "electric, global and high-end" buses will turn to be the driver for the Chinese bus market.

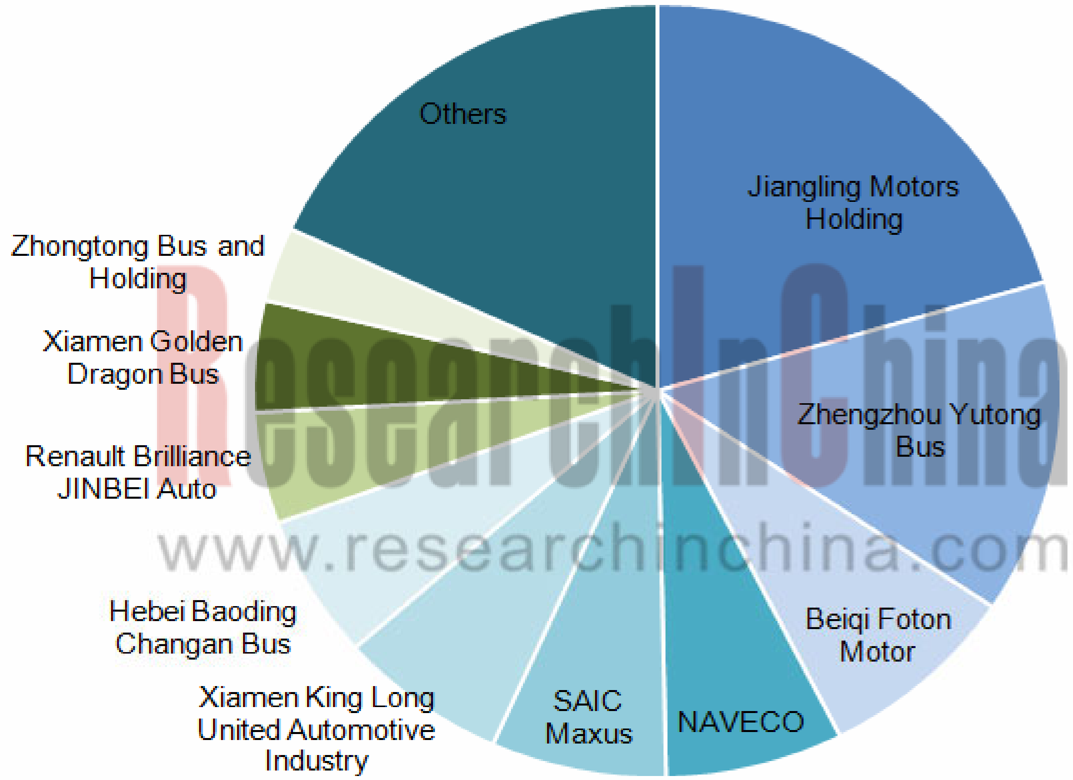
By product, coaches and public buses account for over 80% in China. In 2018, sales of all types of buses suffered a slump, apart from public buses which enjoyed a slight increase.

Public bus: in 2018, public bus market size reached roughly 100,000 units, on a par with what it was in 2015 and 2017 but much less than that in the peak year of 2016. It was a proof that bus market in China was still being redefined. Thereof, 8m/10m buses had become the mainstay of the market and would sustain growth.

Coach: in 2018, sales of this type of bus plummeted as other ways to travel such as high-speed trains, civil aircrafts, private cars and ride-hailing services were in vogue. Wherein, sales of medium and large-sized coaches dropped further while demand for light-sized ones remained relatively stable. There was a change in medium and large-sized coaches market structure that share of those for transporting general passengers waned, compared with a far more bigger proportion of those that were used in tourism and group tour. The rising domestic tourism market will provide a guarantee for the steady growth of medium and large-sized tourist coaches market.

With a range of favorable policies for new energy, new energy bus market will develop at a steady pace. According to auto insurance data, 110,000 new energy buses were sold in China in 2018, down by 7% and 2% versus 2017 and 2016, respectively. In the country, new energy buses, especially medium and large-sized ones which play a crucial role in urban public transit, are superior to diesel engine vehicles beset with huge crisis, in the wake of the launch of Blue Sky Protection Campaign, though subsidies for new energy vehicles are on the decline in 2019.

Competitive Pattern of Bus Market in China, 2018



Source: China Bus Industry Report, 2019-2025

China's bus industry features a stable competitive pattern and a high market concentration. In 2018, the top ten and the top five bus manufacturers dominated over 73% and 50% of the market, respectively. Yet among the ten largest makers, only SAIC Maxus and Xiamen Golden Dragon Bus sold more buses than the previous year in 2018, and the other eight all saw declining sales volume, especially Zhongtong Bus, Renault Brilliance JINBEI Auto and Beiqi Foton Motor whose sales dropped by a wider margin.

China Bus Industry Report, 2019-2025 highlights the following:

- Bus industry (definition, classification, development trends, policy, etc.);
- China bus industry (output, sales, ownership, etc.);
- China bus market segments (large, medium and light buses) (output and sales, competitive pattern, etc.);
- China new energy bus market (output and sales, competitive pattern, policy, etc.);
- China bus industry chain (raw materials market, downstream application market, etc.);
- 16 manufacturers (Yutong Bus, Zhongtong Bus, Xiamen King Long Motor Group, Dongfeng Motor Corporation, Beiqi Foton Motor, Jiangling Group, JAC, etc.) (profile, operation, output and sales, featured products, distribution and latest news of manufacturing bases, etc.).

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