Research Report on China's Passenger Vehicle Market, 2011-2012

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Abstracts

Passenger vehicles (passenger car) are mainly used for the carriage of passengers and their carry-on baggage and/or temporary goods according to the design and technical characteristics, which has no more than nine seats including the driver's seat. It also can tow a trailer. The passenger cars cover sedans, mini buses and light buses with no more than nine seats. It is sub-divided into basic passenger vehicles (sedans), multi-purpose vehicles (MPV), sport-utility vehicles (SUV), dedicated passenger cars and cross-type passenger cars.

In 2011, due to the comprehensive factors such as the rising of oil prices, the revocation of preferential policies to stimulate car consumption, the rigid release of the automobile consumption demand in recent years, the urban traffic congestion and other factors, the sales growth speed of China's passenger vehicle began to decline. In 2011, the sales volume of China's passenger cars was 14.4724 million, with an increase of 5.19% YOY, and the growth speed decreased by about 28% over 2010. Among them, the sales volume of basic passenger vehicles (sedans) was 10.1227 million, with an increase of 6.62% YOY; the sales volume of multi-purpose vehicles (MPV) was 497.7 thousand, with an increase of 11.74% YOY; the sales volume of sport utility vehicles (SUV) was 1.5937 million, with an increase of 20.19% YOY; the sales volume of cross-type passenger cars was 2.2583 million, with a decrease of 9.38%.

In 2011, the passenger car manufacturers with the top ten sales volumes were as follows in China: SAIC-GM-Wuling, Shanghai GM, Shanghai Volkswagen, FAW-Volkswagen, Dongfeng Nissan, Beijing Hyundai, Chery, Chongqing Chang'an, FAW Toyota and BYD. The sales volume of passenger cars of Chongqing Chang'an, BYD and Chery declined compared with that of the same period in 2010, but that of other enterprises maintained growth. Among them, the growth rate of Dongfeng Nissan was

among the top. In 2011, these above-mentioned 10 companies sold a total of 8.3075 million cars, accounting for 57% of the total sales volume of passenger cars.

In 2011, the sales volume of China's independent brand passenger cars was 6.1122 million, with a decrease of 2.56%, accounting for 42.23% of the total sales volume of passenger cars. The occupancy rate dropped by 3.37% compared with that of the same period in 2010. The sales volume of models of Japan, Germany, the U.S.A, South Korea and France respectively were 2.8074 million, 2.3847 million, 1.5917 million, 1.1723 million and 404.1 thousand, accounting for 19.40%, 16.48%, 11.00 %, 8.10% and 2.79% of the total sales volume of passenger cars.

It is expected that in 2012, the passenger car market will have some recovery though Chinese economic growth rate will decline. This is because China's per capita income is still growing, promoting the car sales; at the same time, the government is expected to introduce some car-related incentive policies. Current conditions are similar to that of the early 2009 in many respects, and it has conditions to introduce some automobile incentive policies. On March 6, 2012, halving the tax levy of Chinese energy-saving car and ship is the policy shift signal. In 2012, it is expected that China passenger car industry will restore the natural growth while the sales volume will achieve about 8%-10 % growth in the role of the relevant incentive policies.

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