

China Automotive Industry Report - H2, 2013

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Abstracts

This report discusses China's automotive industry, starting with a sector profile and continuing on to provide analysis of trends through H2 2013 and forecast the market outlook through 2020. The report also includes profiles of leading players in the sector including SAIC Motor Corp., Beiqi Foton Motor Co., Anhui Jianghuai Automobile Co., Great Wall Motor Co., and Changan Automobile Co.

In 2012, the number of automobiles sold in China topped 19.3mn units, a y/y increase of 4.2%. In the first nine months of 2013, sales grew by 12.8% y/y to 15.9mn units. Sales of passenger cars and light trucks were strong in the third quarter. The top 10 largest automakers sold over 14mn vehicles in the first nine months of 2013 and accounted for 88.5% of market share in China. The level of industry concentration has also increased compared to 87.3% in 2012.

Sales of Chinese-brand passenger vehicles grew by 13.2% y/y to 3.57mn units in the first half of 2013. Prices stayed slightly below RMB105,000-level over the first nine months of 2013. In the first six months of 2013, 5,885 new energy vehicles were produced and 5,889 were sold. Pure electric vehicles accounted for 87% of new energy vehicle sales, while the plug-in EV made up the remainder.

Key Points:

The report includes financial information and a comparative matrix for six leading domestic players in the sector: SAIC Motor Corporation Limited (SAIC Motor), Beiqi Foton Motor Company Limited (Beiqi Foton), Anhui Jianghuai Automobile Company Limited (JAC), Great Wall Motor Company Limited (GWM), and Changan Automobile Company Limited.

Sales of automobiles in the first nine months put China in line to top 20mn in

vehicle sales in 2013.

Intense competition and slower sales growth have driven Chinese automakers to seek new sources of growth abroad.

More than 40 models of new energy vehicles have been launched by automakers in China between 2012 and July 2013.

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