

China Commercial Vehicle Industry Report, 2015-2018

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Abstracts

In 2010-2014, the sales volume of commercial vehicles in China fell from 4.3041 million units to 4.055 million units, seeing a share in total automobile sales down from 23.8% to 19.7%. During Jan.-Sept. 2015, the sales volume of commercial vehicles totaled 2.5087 million units, accounting for 14.7% of total auto sales. It is estimated that the full-year sales figure in 2015 will approximate 3.6 million units.

In terms of models, the truck sales occupied a higher portion, at around 65%; despite a low percentage of roughly 10%, the sales volume of buses embraced a rising proportion. In the first nine months of 2015, the sales volume of trucks and buses in China came to 1.6499 million units and 367,600 units, respectively, holding 65.8% and 14.7%.

In Jan.-Sept. 2015, China, a big exporter of commercial vehicle, exported 257,100 commercial vehicles, a figure that made up 43.1% of total auto exports. Among them, the export volume of buses and trucks totaled 195,300 units and 45,800 units, respectively. The commercial vehicles are mainly sold to the Asian and African countries such as Vietnam, Algeria, and Myanmar.

At present, there are a total of 74 auto makers that sell commercial vehicles, which formed a highly competitive market. Among them, Beiqi Foton, Dongfeng Motor, Jinbei Automotive, JAC, JMC, Yutong Bus, and King Long Motor enjoy higher competitiveness in a relative sense.

Beiqi Foton is China's largest commercial vehicle enterprise that has the most extensive models. In 2014, the company sold 547,900 commercial vehicles, occupying 14.5% (ranking No.1) of total sales in China. In the past two years, the company has lavished more funds into development and release of new energy commercial vehicles. In 2014, Foton launched AUV series battery vehicle products, Aoling CNG light-duty

trucks, and the world's first LNG power-pump vehicle, etc., with the full-year sales volume of 11,964 new energy vehicles (including natural gas-powered ones).

In 2014, Dongfeng Motor sold 500,200 commercial vehicles, representing 13.2% of total sales, which enabled the company to rank second. Since 2005, the company has started the development of new energy vehicle products, a move that made the company the first to achieve the commercialization of new energy vehicles. The products cover many market segments including public transportation, highway, city logistics, sanitation, and special-purpose vehicles. In Jun.-Nov. 2015, the company signed orders of an aggregate 17,000 new energy vehicles with 5 companies -- Shanghai Beidou Neo-Energy Co., Ltd., Zhejiang SKIO Matrix Co., Ltd, Kunshan Guangdeyuan EV Leasing, Zhejiang Zhongdian Automobile, and SinoEV Tech.

King Long Motor is mainly engaged in the manufacturing and sales of large, medium and light-duty buses. In 2014, the company sold 24,385 large-sized buses and 15,417 medium-sized buses, making up 29.9% and 24.6%, respectively, in both of which the company ranked second. Meanwhile, the company was the first in China to massively export European ? high-end models. Additionally, the company released a series of plug-in hybrid electric vehicles and battery electric new energy buses. In 2014, the sales volume of new energy buses reached 3,431 units, and this figure went up to 4,150 units in the first half of 2015.

As the national IV emission standard is phased in nationwide, China's commercial vehicle market is facing structural adjustment. And the release of Made in China 2025 indicates that the State will step up the support for intelligent vehicles and energy-saving and new energy vehicles, which would provide a good development opportunity to traditional commercial vehicle enterprises. At present, Beiqi Foton, Dongfeng Motor, JAC, Yutong Bus, King Long Motor and other commercial vehicle makers have been dedicated to developing and upgrading new energy automotive technologies and launching the products, basically occupying China's new energy commercial vehicle market.

China Commercial Vehicle Industry Report, 2015-2018 highlights the followings:

Overview of commercial vehicle industry, including definition, classification, and related policies;

Development of China's commercial vehicle industry, including status quo of automobile industry, output and sales volume of commercial vehicles, and

forecast and outlook, etc.;

Import and export of commercial vehicles in China;

Industry competition of commercial vehicles, including market concentration, competitive landscape, etc.;

Operation, capacity, production and sales, R&D and investment, etc. of 10 Chinese commercial vehicle-related companies.

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