

China Electric Bus Industry Report, 2015-2020

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Abstracts

China Electric Bus Industry Report, 2015-2020 by ResearchInChina focuses on the followings:

Significance, status quo, development trends at home and abroad of electric bus promotion;

Mainstream technology roadmaps for electric bus, and status quo & trend of bus battery, motor, electronic control industry chain in China;

Main subsidies for purchase (tax relief and fiscal subsidies) and usage in China electric bus industry, and promotion policies nationwide;

Electric bus output & sales volume and future trends in China, competitive landscape among and market share, sales volume prediction, investment and capacity of major electric bus companies;

Technological level, output & sales volume, capacity and development strategy of 12 major Chinese electric bus manufacturers.

Sales volume of electric bus reached 27,000 vehicles throughout the year 2014, soaring by 160.3% from the previous year, and kept growing rapidly in the first half of 2015, approaching 20,000 vehicles. It is expected that China will sell 154,000 electric buses in 2020, with a CAGR of 33.6% during this period.

The variety that is vigorously promoted is electric public bus which accounts for 85% of total sales volume of electric bus. City bus ownership in China now has exceeded 500,000 vehicles, carrying 60% of city passenger transportation in urban public

transport system. As of 2014, electric public bus ownership nationwide topped 80,000 vehicles.

Next, the Chinese government will gradually cut fuel subsidies for traditional bus and shifts financial support to electric model, the move that will give local governments a significant stimulus to replace new additional public buses with electric ones. It is expected that new electric public buses added in 2020 will make up 70% of new public buses added that year, and cumulative electric public bus ownership will exceed 300,000 vehicles by 2020. Technologically speaking, all-electric public bus, significantly propped up by policies, will be the main orientation of future development.

Besides public bus, light business-purpose bus and touring bus markets will be next market spotlights for electric bus. New energy commercial bus rating had been completed in the first quarter of 2015, and 3,000 vehicles are expected to be sold in 2015. With advances in battery technology, improvement in charging infrastructure along expressways, long-distance transportation will become possible, and the triggering point for this market segment is expected to occur around 2018.

Seen from battery, motor and electronic control industry chain, electric bus now adopts mainly LFP power battery and “LFP+ supercapacitor” dual-battery system. Based on the type of battery used by electric bus in the first half of 2015, configuration rate of LFP power battery including “LFP+ supercapacitor” dual-battery system was up to 82%. Rated power of drive motor for electric bus mostly falls into the range of 80 kW to 120kW. Asynchronous motor still holds a dominant position, as it can provide high-power traction; permanent-magnet synchronous motor starts to be massively used in medium-sized and small buses.

In point of competitive landscape among companies, top5 electric bus manufacturers in 2014 were Yutong Bus, Xiamen King Long Motor Group (including three wholly-owned subsidiaries: Higer Bus, Xiamen King Long United Automotive Industry, Xiamen Golden Dragon Bus), BYD, Nanjing Golden Dragon Bus and Zhongtong Bus, together producing 17,011 vehicles, 62.5% of the country's total.

As electric bus enjoys enormous space for future development and can greatly drive the development of relevant industrial chains, China has ushered in an electric bus investment boom since 2014, with planned investment in electric bus announced by key bus makers nationwide exceeding RMB21 billion according to preliminary statistics and a lot of capacity putting into production in 2016 and 2017. Cities like Shenzhen, Nanjing and Wuhan took a lead in this round of investment and attracted a number of technically

leading bus manufacturers to settle in.

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