

China Highway Traffic and Transport Industry Report, 2006

<https://marketpublishers.com/r/C4E44315E29EN.html>

Date: February 2007

Pages: 120

Price: US\$ 1,600.00 (Single User License)

ID: C4E44315E29EN

Abstracts

By the end of 2005, the total expressway mileage amounted to 41,000 km in China, ranking second of the world; the accumulated mileage of highway at county-level and town-level reached 1.4757 million km, sharing 85.4% of China newly-added highway mileage; National average highway density is 20.1 km per hundred square kilometers; 99.81% towns and 94.3% villages have built up highways. From January to October of 2006, China highway freight traffic volume amounted to 11.68 billion tons, passenger carrying capacity via highway totaled 15.24 billion person times, and highway construction investment reached RMB 486.99 billion.

According to the plan of Ministry of Communications of China, by 2010, the total highway mileage will achieve 2.1-2.3 million km, and 5 vertical and 7 horizontal national trunk highways will be completed. Besides, the expressway access rate among cities with population over 200,000 will reach 90%, and the total expressway mileage is expected to amount to 50,000 km.

As an infrastructure industry, the highway construction industry not only plays an important role in the development of national economy, but also promotes the development of many other industries. Due to its particularity from project approval to plan and then to capital, highway construction industry is largely influenced by the governmental policies. However, the investment body has become more diversified instead of previous single state investment since the introduction of non-public capitals. Although this change still maintains the highways under the control of Chinese government, yet it forces the management model of highway administrations to change from direct control to indirect control.

As highway construction policies gradually turned open, the highway construction has

experienced a peak in 2006. However, it is also confronted with grim challenges, and still lags behind the developed countries.

In terms of the industrial lifecycle, the highway construction industry currently is in a growth period; from the angle of expansion coefficient, the industry has now meet the best period for expansion since the year of 2000, moreover, the investment risk is relatively small; in view of fluctuation coefficient, the industrial development sees a small fluctuation, which indicates that the investment risk grade is in medium level.

High-grade highways develop rapidly in China in recent years, but the highway maintenance industry could not catch up with its pace, which results in some gaps, so investors are also suggested to keep an eye on highway maintenance industry apart from high-grade highway construction.

This report first explains the definition of highway and related summary, and then gives an analysis on the overview of Chinese highway transport as well as highway construction. Following is the in-depth analysis on expressway, national expressway network plan, rural highway and west regional highway. Meanwhile, it probes into the highway operation and management, highway maintenance, key enterprises, BOT and highway construction. Finally, it foresees the development prospects of investment and construction of highway in a scientific way. This report is of great reference value for investors and potential entrants who are interested in China highway traffic and transport industry.

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