

# Report on Commercial Vehicle Industry in China, 2018-2022

<https://marketpublishers.com/r/R5B515518A1EN.html>

Date: January 2018

Pages: 60

Price: US\$ 2,600.00 (Single User License)

ID: R5B515518A1EN

## Abstracts

### Description

Commercial vehicles are vehicles designed with specific technology for delivery of passengers and cargos. They contain all freight vehicles and the passenger vehicles with more than 9 seats.

Commercial vehicles can be classified as passenger vehicles and freight vehicles. Freight Vehicles are vehicles with specific design and equipment for goods carriage. They can be divided into two types by purpose: dump trucks that are mainly used in coal mining and industrial mining, and tractor trucks that are mostly applied in long-distance freight transport. Passenger vehicles are intended for delivery of large numbers of passengers and their baggage. They are usually subdivided into large, medium and light ones according to the body length and seating capacity.

Highway transportation has an advantage over aerial, railway and water transportation in that it provides a door-to-door delivery in a cost-effective way. The total mileage of highway was 4,696.3 thousand kilometers in China by the end of 2016, with an increase of 2.6% over the previous year. The highway density reached 48.92 km per hundred km<sup>2</sup> in 2016, with an increase of 1.24 km per hundred km<sup>2</sup> over the previous year. China's highway freight volume amounted to 33.413 billion tons in 2016, with a growth rate of 6.1% over 2015. The freight turnover volume reached 6,108.01 billion tons per km, with a growth rate of 5.4% over 2015. Constant increase in highway freight volume facilitates the demand for commercial vehicles in China.

The production volume of commercial vehicles exhibited an overall upward trend from 2012 to 2017, increasing from 3,748.1 thousand units to 4,208.7 thousand units in the

past five years, with the growth rate fluctuating in the period. After a decline of 4.72% in 2012, the production volume shifted to an increase of 7.56% in 2013. Followed by plunges of over 5% both in 2014 and 2015, sharp increases took place in 2016 and 2017, particularly in 2017 when the year-on-year increase reached 13.81%.

Investment in urban rail transit, real estate, urban transformation and urbanization stimulated demand for commercial vehicles in 2013, particularly that for heavy trucks. However, the implementation of National IV Standard was delayed to 2014, which resulted in an overtime production of National III-standard vehicles as unsold ones among automakers so as to make more profits. Moreover, restrictions on commercial vehicles that were released successively since 2014 forced down production volume in 2014 and 2015. Thanks to favorable policies to commercial vehicles and increased freight volume in recent years, demand for freight vehicles are being stimulated and a high production volume is achieved once again.

The commercial vehicle market is largely influenced by national policies. For example, the Chinese government's restrictions on commercial vehicles in 2014 and 2015 caused the overall production volume to decline. Since 2016 when subsidy policies were adopted, the production volume of commercial vehicles recovered to some degree. As the toll-by-load policy was carried out on highways, light trucks grew in sales. As new emission standards are issued, technological innovation within enterprises accelerates, further promoting sales volume of new-energy commercial vehicles.

With constant improvement in infrastructure and rural roads in China, the freight volume and passenger volume on highways are expected to keep growing from 2018 to 2022, driving forward the development in commercial vehicle industry.

Readers Can Obtain the Following Information or More Through This Report:

Economic and Policy Environment of Commercial Vehicle Industry in China

Analysis of Supply and Demand in Commercial Vehicles in China

Production Cost and Sales Price of Commercial Vehicles in China

Analysis on Import and Export of Commercial Vehicles

Competition in Commercial Vehicle Market in China

Top10 Commercial Vehicle Manufacturers in China

Driving Forces and Market Opportunities in Commercial Vehicle Industry in China, 2018-2022

Threats and Challenges in Commercial Vehicle Industry in China, 2018-2022

Forecast on Supply and Demand of Commercial Vehicles in China, 2018-2022

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- 5 Anhui Jianghuai Automobile Group Corp., Ltd.
- 6 Jiangling Motors Co., Ltd.

- 7 SAIC-GM-Wuling Automobile Co., Ltd.
- 8 Changan Automobile Co, Ltd.
- 9 Shaanxi Automobile Holding Group Co. Ltd.
- 10 Lifan Industry (Group) Co., Ltd.



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