

Research Report on China's Sport Utility Vehicle (SUV) Industry, 2018-2022

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Abstracts

DESCRIPTION

The SUV is a vehicle that integrates the comfort and space function of station wagons, the traction of trucks and the four-wheel drive capability of off-load vehicles. With a broad space and powerful engine, the SUV can load goods and carry more passengers than sedans. By body length and wheelbase, SUVs can be classified into small SUVs, compact SUVs, midsize SUVs, medium-to-large SUVs and full-size SUVs.

In recent years, the global SUV sales have been surging. In 2017, it reached a record high of 27.85 million units, up 12.7% over 2016, driven by China, Europe, Southeast Asia, Latin America, etc., according to CRI. Consumers in China tend to purchase larger vehicles with the economic development and the upgrade of automobile consumption. In 2017, the sales volume of passenger vehicles reached 24,718,300 units, growing by 1.4% YOY, a growth rate that fell sharply. The growth in the sales volume of sedans, multipurpose passenger vehicles (MPVs) and cross passenger vehicles all slowed down. Only SUV sales increased by 13.3% YOY.

From 2013 to 2017, SUV sales grew rapidly in China, with the growth rate reaching 27% in 2016. In 2017, the SUV sales in China hit a record of 10,252,700 units. The booming SUV market in China also fueled the development of electric SUVs whose sales volume grew from only 18,000 units in 2015 to 89,000 units in 2017 by nearly five times. By advantage of low prices, domestic brands account for more than half of the market share by sales volume. Compact SUVs have long been dominant in China while small SUVs are seeing a decline in market share.

China's automobile market is undergoing a period of slow growth as China's economic

growth slows down. However, the high growth rate of the SUV market has attracted the attention of many automakers and led to increasingly fierce market competition. For more market share, some joint-venture automobile brands keep launching low-end SUVs to compete with domestic automobile brands on the low-price market. Less well-known, domestic automobile brands find it difficult to compete with joint venture automobile brands and imported ones on the high-end market.

From 2018 to 2022, the Chinese economy is expected to maintain steady growth and the demand for SUVs will continue to grow with the rise in the income of Chinese residents. Compared with developed countries, China's automobile consumption market is still at an early stage, and there is huge growth potential for automobile reserve volume. Moreover, in response to resources and environment pressure, new energy SUVs are growing rapidly with policy support, which further expands the market for SUVs. From 2018 to 2022, SUV sales will take up a larger proportion of the passenger vehicle sales in China and exceed 15 million units in 2022.

TOPICS COVERED:

Definition and classification of SUVs

Development environment of China's SUV industry

Competition in China's SUV industry

Analysis on major SUV manufacturers in China

Production cost trend and price trend of SUVs

Major driving forces and market opportunities for China's SUV industry from 2018 to 2022

Prospect of China's SUV industry from 2018 to 2022

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COMPANIES MENTIONED

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- 4 SAIC Volkswagen Automotive Co., Ltd.
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