

# Research Report on Global and China's Commercial Vehicle Industries, 2019-2023

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## Abstracts

### DESCRIPTION

In terms of design and technical characteristics, commercial vehicles are vehicles that are used to transport people and goods

They include trucks that are designed and equipped for carrying goods and buses that have more than nine seats and are used to carry a large number of passengers and their carry-on baggage.

According to CRI, compared with air transport, rail transport, water transport and other modes of transport, highway transport has door-to-door advantage and high cost performance. By the end of 2018, the length of China's highways totaled 4,846,500 kilometers, increasing by 73,100 kilometers as compared to 2017; road density reached 50.48 km/100 sq.km., increasing by 0.76 km/100 sq.km. as compared to 2017; the freight traffic of highways reached 39.57 billion tons, increasing by 7.30% YOY; the freight turnover of highways reached 7,124.92 billion ton-km, increasing by 6.70% YOY. The growing highway traffic boosts the demand for commercial vehicles.

The production volume of commercial vehicles in China increased from 3,791,000 units in 2014 to 4,371,000 units in 2018. Although it showed a YOY decrease in 2015, it kept rising from 2016 to 2018. Especially in 2018 when the production and sales of automobiles declined, the production and sales of commercial vehicles both achieved growth.

According to CRI, China's commercial market is deeply influenced by policies. For example, from 2014 to 2015, the Chinese government released some restrictive policies

on commercial vehicles, which led to a decline in commercial vehicle production. In 2016, the government started to subsidize the commercial vehicle industry and took other encouraging measures, which pushed up the production of commercial vehicles to some extent. When the tolls on highways began to be collected based on actual load, the sales volume of light trucks increased. When the emission standards were raised, enterprises accelerated technological innovation and the sales volume of new energy commercial vehicles increased.

CRI expects that, with the improvement of road networks and the development of rural roads, both the freight traffic and passenger traffic of China's highways will continue to grow from 2019 to 2023, which will stimulate the demand for commercial vehicles. In 2018, the fixed-asset investment in China reached CNY 63,563.60 billion, increasing by 5.90% YOY. The growth rate of fixed-asset investment has a great impact on the development of China's commercial vehicle industry, especially the truck sub-industry. To ensure annual GDP growth rate of no less than 6%, from 2019 to 2023, the Chinese government will certainly increase investment in fixed assets, especially in infrastructure projects, which will drive the demand for commercial vehicles.

Topics covered:

Economic and policy environment for the commercial vehicle industry

Analysis on supply of and demand for commercial vehicles

Manufacturing costs and prices of commercial vehicles in China

Analysis on import and export of commercial vehicles in China

Competition on China's commercial vehicle market

Major commercial vehicle manufacturers in China

Driving forces and market opportunities for the commercial vehicle industry

Threats and challenges to the commercial vehicle industry

Forecast on supply of and demand for commercial vehicles in China from 2019 to 2023

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