

Research Report on Chinese Commercial Vehicle Industry, 2010-2011

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Abstracts

Commercial vehicles like trucks and buses are used for business purposes, that is, generating business benefits for vehicle owners by carrying passengers or goods. It is a concept opposite to passenger vehicle.

In 2009, the production and sales volume of motor vehicles in China came to 13.79 million and 13.64 million, rising by 48.30% YOY and 46.15% YOY separately. The production and sales volume of passenger vehicles were 10.38 million and 10.33 million, growing by 54.11% YOY and 52.93% YOY. The production and sales volume of commercial vehicles were 3.41 million and 3.31 million, rising by 33.02% YOY and 28.39% YOY separately. In 2009, Chinese auto industry achieved fast development, making China the world largest auto production country and new vehicle consumption country.

Commercial vehicles are designed for the transport of passengers and goods. Since 2005, Chinese auto industry begins to adopt the new auto model classification. Different from the old classification, the new one includes all trucks and buses with over 9 seats.

In the practical application, commercial vehicles are defined mainly according to their uses.

In China, commercial vehicles can be classified into buses, trucks, semi-trailer towing vehicles, incomplete buses and incomplete trucks. According to the length, buses can be divided into minibus (less than 3.50 m), small bus (3.50-7 m), medium bus (7-10 m) and large bus (over 10 m).

According to the carrying tonnage, trucks in China can be divided into mini-trucks (less

than 1.80 tons), light trucks (1.80-6 tons), medium trucks (6-14 tons) and heavy trucks (over 14 tons). In China's commercial vehicle market, the production proportion of trucks is the largest. In 2009, the production proportion of trucks reached 68.28%. By contrast, the production of semi-trailer towing vehicles was only 208,200, accounting for 6.11%.

In 2009, with the implementation of the CNY-4-trillion investment plan of Chinese government and the construction of large projects after the earthquake, the urban fixed asset investment in China rose by 32% YOY, the highest of recent years. This directly or indirectly boosts the demand for trucks.

In 2009, the implementation of some policies, laws and regulations encouraging consumption also actively propelled the development of Chinese commercial vehicle market.

In 2009H2, the demand for commercial vehicles in China recovered obviously. The truck market contributed the most to this recovery. In 2009, the production and sales volume of buses were 276,000 and 271,300, rising by 9.65% YOY and 7.28% YOY separately. The production and sales volume of trucks were 2.33 million and 2.25 million, growing by 46.85% YOY and 40.95% YOY respectively. The production and sales volume of semi-trailer towing vehicles were 208,200 and 211,100 respectively, rising by 6.61% YOY and 8.73% YOY. The production of incomplete buses were 82,000, dropping by 4.04% YOY; the sales volume reached 82,800, falling by 5.66% YOY. The production of incomplete trucks was 514,700, rising by 15.70% YOY; the sales volume came to 498,200, rising by 10.81% YOY.

In January-August of 2010, the production of commercial vehicles in China was 2.84 million and the sales volume approached 2.90 million, rising by 33.92% YOY and 37.61% YOY.

China's export scale of motor vehicles and spare parts is still much smaller than that of developed countries and emerging industrialized countries. Presently, the export still stays in the initial period. Problems like the deficiency of brands and marketing networks, low added value of products for export and disputes over intellectual property rights, etc. restrain the development of China's export of auto products. Due to the financial crisis, the problems in China's auto product export market become more obvious since 2008H2. The export has suffered sharply decline. Chinese auto product export is confronted with severe situation. Nonetheless, the international comparative advantages of China's auto products still exist and the international market shows

tremendous demand potential.

As commercial vehicle has the attributes of investment goods, its demand growth is closely related to the growth rate of the macro economy. In recent years, the rapid growth of China's economy brings about the boom of Chinese commercial vehicle market. Given the expectation of stable macroeconomic growth in China, the demand for commercial vehicles will maintain a stable growth rate in the long run.

Through this report, readers can acquire more information:

Status quo of Chinese commercial vehicle industry

Status quo of Chinese truck industry

Status quo of Chinese bus industry

Competition in Chinese commercial vehicle market

Import and export of commercial vehicles in China

Major commercial vehicle manufacturers in China and their operations

Prediction on development of Chinese commercial vehicle industry

Prediction on investment opportunities in Chinese commercial vehicle industry

Following persons are recommended to buy this report:

Commercial vehicle manufacturers

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Commercial vehicle traders

Research institutes concerning Chinese commercial vehicle industry

Investors concerning Chinese commercial vehicle industry

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