

Research Report on Chinese Passenger Vehicle Market, 2009-2010

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Abstracts

A passenger car is a car used for carrying passengers, their carry-on baggage, and temporary items in its design and technical characteristics. It has no more than 9 seats, including the driver seat. It also can draw a trailer. The passenger car covers the car, the minibus, and the light bus with no more than 9 seats. The passenger car can be subdivided into the basic passenger car (car), the multipurpose vehicle (MPV), the sports utility vehicle (SUV), the special passenger car and the cross-type passenger car.

In 2008, the growth rate of Chinese passenger car market was obviously slower. The total sales volume was 6.7556 million, with a YOY increase of 7.27%. The growth rate fell by 14.41% over the same period last year. Among the main varieties of passenger cars, only the growth rate of cross-type passenger cars grew a little higher over the last year. The sales volumes of basic passenger cars and SUVs fell sharply. The demand for MPVs declined for the first time since 2005 and its market was especially sluggish.

In 2008, the sales volume of Chinese basic passenger cars was 5.0496 million, with a YOY increase of 6.78%. The growth rate dropped by 16.68% over the same period of 2007. The sales volume of MPVs was 197,400, with a YOY decrease of 12.56%. The sales volume of SUVs was 447,700, with a YOY increase of 25.28%. The growth rate was dropped by 24.81% over 2007. The sales volume of cross-type passenger cars was 1.0636 million, with a YOY increase of 7.67%. The growth rate rose by 0.05% over 2007.

In 2008, the entire automobile market was sluggish, but cross-type passenger cars kept growing steadily and became the only vehicle type with the rising growth rate. In 2008, the accumulated sales volumes were 1.0636 million, with a YOY increase of 7.67%,

accounting for 15.47% of the total sales volume of Chinese passenger cars and accounting for 11.34% of the total sales volume of vehicles. Following cars and trucks, the sales volume of cross-type passenger cars ranked the third.

In 2008, among main Chinese manufacturers producing cross-type passenger cars, SGMW was still in front. The total sales volume was 545,200, with a YOY increase of 17.48% and accounting for 51% of the total sales volume of cross-type passenger cars. The sales volumes of Chongqing Changan (excluding Nanjing Changan) and Hafei ranked the 2nd and the 3rd respectively. However, their sales volumes decreased over the last year by 222,400 vehicles and 108,400 vehicles respectively. The sales declined by 6.90% and 11.45% YOY. In 2008, the 3 enterprises mentioned above sold 876,000 vehicles in all, accounting for 82% of the total sales volumes of Chinese cross-type passenger cars.

By the end of 2008, 447,700 SUVs were sold out in China, with a YOY increase of 25.28%. The growth rate was dropped by 24.81% over 2007 and higher than that of the passenger car industry by 18.01%. Among the main varieties of SUVs, the varieties below 2.0 L sell best with 213,400 vehicles, accounting for 47.67% of the total SUV sales volume. The sales volume of varieties between 2.0L and 2.5 L was the second best, which was 180,900, accounting for 40.41% of the total SUV sales volume. The varieties over 2.5 L didn't have a large proportion. They were only the supplements for SUV's segment market. The sales volume was 53,400, accounting for 11.93% of the total SUV sales volume.

Among the main SUV brands, in recent years, the metropolitan type SUV variety is more and more popular among clients. In 2008, CRV of Honda always dominated the market. Its total sales volume was 80,600, increased by 76.4% YOY. However, the demands for Hover and Tiggo which sold well in 2007 decreased sharply.

In terms of the enterprises manufacturing SUVs, the enterprises with top five sales volumes are followed:

- 2008 Dongfeng Honda Great Wall Chery Beijing Hyundai KIA
- Sales Volume 80,600 62,200 50,200 41,200 32,500
- SUVs of the Five Above Totaled 266,700
- Proportion of Chinese SUV Market 60%

Source: China Research and Intelligence

In 2008, the MPV market was sluggish. The total sales volume was only 197,400, with a

decline of 12.56% YOY. Among the main MPV varieties, each series of products larger than 1.6L declined in varying degrees. Among them, the vehicles (1.6L

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