

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

Contents

1 OVERVIEW OF CHINESE PASSENGER VEHICLE MARKET, 2008-2009

- 1.1 Analysis on the Market Supply and Demand, 2008-2009
 - 1.1.1 Analysis on the Supply and Demand
 - 1.1.2 Change of the Consumption Structure
 - 1.1.3 Prediction on the Passenger Vehicle Consumption Market, 2010
- 1.2 Analysis and Prediction on the Export and Import of the Passenger Vehicle Market
 - 1.2.1 Analysis on the Import Market
 - 1.2.2 Analysis on the Export Market
 - 1.2.3 Comparative Analysis on Import Prices and Export Prices
 - 1.2.4 Analysis on the Import and Export Trend, 2010
- 1.3 Analysis on the Change of Passenger Vehicle Prices
- 1.4 Analysis and Prediction on the Supply in Chinese Passenger Vehicle Industry, 2010
- 1.5 Analysis on the Influences of the Global Financial Crisis on Chinese Passenger Vehicle Market
 - 1.5.1 Influences on the Supply
 - 1.5.2 Influences on the Consumption

2 ANALYSES AND PREDICTION ON THE MARKET COMPETITION IN THE PASSENGER VEHICLE INDUSTRY, 2008-2010

- 2.1 Analysis and Prediction on the Competition Features
 - 2.1.1 Appearance of Collective Recall and Gradual Maturity of the Automobile Market
 - 2.1.2 Analysis on the Concentration Degree of Passenger Vehicle Outputs
 - 2.1.3 Analysis on the Entrance Barriers and Exit Barriers
- 2.2 Analysis and Prediction on the Competition Structure
 - 2.2.1 Analysis and Prediction on Suppliers
 - 2.2.2 Analysis and Prediction on Buyers
 - 2.2.3 Analysis and Prediction on Substitutes
 - 2.2.4 Analysis and Prediction on Potential Competitors
 - 2.2.5 Analysis and Prediction on Competitors within the Industry
- 2.3 Analysis on the Brand Competition
 - 2.3.1 Analysis on the Brand Structures of Chinese Passenger Vehicle Market, 2008-2009
 - 2.3.2 Analysis on the Brand Competition Status of Chinese Passenger Vehicles, 2008-2009

- 2.3.3 Brand Competition Status of Chinese Cars, 2008-2009
- 2.3.4 Brand Competition Trend of Chinese Automobiles
- 2.4 Analysis and Prediction on Merger and Restructuring of Chinese Passenger Vehicle Industry
 - 2.4.1 Background Analysis
 - 2.4.2 Case Study
 - 2.4.3 Trend Prediction

3 ANALYSES ON CHINESE PASSENGER VEHICLE SUBSIDIARIES

- 3.1 Analysis on the Supply and Demand Changes in the Car Market
 - 3.1.1 Analysis on the Supply and Demand Changes
 - 3.1.2 Analysis on the Change of the Consumption Structure
 - 3.1.3 Stable Trend of the Car Price System
- 3.2 Analysis on the Supply and Demand Changes in the MPV Market
 - 3.2.1 Analysis on the Supply and Demand Changes
 - 3.2.2 Analysis on the Change of the Consumption Structure
- 3.3 Analysis on the Supply and Demand Changes in the SUV Market
 - 3.3.1 Analysis on the Supply and Demand of Two-wheel Drive SUV
 - 3.3.2 Analysis on the Supply and Demand of Four-wheel Drive SUV
- 3.4 Analysis on the Supply and Demand Changes in the Crossover Passenger Vehicle Market
 - 3.4.1 Analysis on the Supply and Demand Changes
 - 3.4.2 Analysis on the Change of the Consumption Structure

4 ANALYSES ON THE MAIN ENTERPRISES IN CHINESE PASSENGER VEHICLE MARKET

- 4.1 SGMW
 - 4.1.1 Overview
 - 4.1.2 Operation Status
 - 4.1.3 Strategies and Prospects
- 4.2 FAW-VW Automobile Co., Ltd
 - 4.2.1 Overview
 - 4.2.2 Operation Status
 - 4.2.3 Strategies and Prospects
- 4.3 Shanghai Volkswagen
- 4.4 Shanghai General Motors
- 4.5 FAW Toyota

- 4.6 CHERY
- 4.7 Dongfeng Nissan
- 4.8 Guangzhou Honda
- 4.9 Beijing Hyundai
- 4.10 CHANA

5 ANALYSES ON THE RISKS IN CHINESE PASSENGER VEHICLE INDUSTRY, 2008

- 5.1 Analysis on the Economic Environment Risks
 - 5.1.1 Analysis on the Economic Environment Risks
 - 5.1.2 Macro-control Policy Risks
 - 5.1.3 Central Bank Monetary Policy and Banking Control Policy
 - 5.1.4 Analysis on Exchange Rate Change Risks
- 5.2 Analysis the Policy Environment Risks in the Passenger Vehicle Industry
 - 5.2.1 Analysis on the Adjustment Policy Risks of the Automobile Consumption Structure
 - 5.2.2 Analysis on the Influences and Risks of Automobile Operation Policies
 - 5.2.3 Technology Policies
 - 5.2.4 Overcapacity and Industrial Structure Policies
 - 5.2.5 Prediction on Changing Trends and Risks of the Policy Environment, 2008-2009
- 5.3 Analysis on the Market Risks in the Passenger Vehicle Industry
 - 5.3.1 Supply and Demand Risks
 - 5.3.2 Analysis on the International Market Risks
 - 5.3.3 Analysis on the Market Competition Risks
 - 5.3.4 Substitutability Risks
 - 5.3.5 Price Risks
 - 5.3.6 Raw Material Risks

6 ANALYSES ON THE INVESTMENT OPPORTUNITIES IN CHINESE PASSENGER VEHICLE MARKET

- 6.1 Market Opportunities
- 6.2 Merger and Restructuring
- 6.3 Other Opportunities
- 6.4 Suggestions on Investment and Development

Selected Charts

SELECTED CHARTS

Chart Outputs and Sales Volumes of Chinese Passenger Vehicles, 2004-2008
Chart Productivity Growth Status of Some Chinese Automobile Enterprises, 2007-2009
Chart Passenger Vehicle Outputs of Chinese Top Five Automobile Groups, 2008
Chart Competition Structures of Chinese Automobile Industry, 2008-2009
Chart Consumption Structures of Chinese Passenger Vehicle Market, 2008-2009
Chart Changes of Chinese MPV Consumption Structure, 2008
Chart Chinese TOP 10 Passenger Vehicle Enterprises Based on Sales Volumes, 2008
Chart Export and Import Volumes of Chinese Passenger Vehicles, 2004-2008
Chart Brand Structure of Chinese Passenger Vehicle Market, 2008
Chart Main Merger and Restructuring Cases in Chinese Passenger Vehicle Industry, 2007-2009
Chart Production and Sales Status of Chinese MPV, 2004-2008
Chart Operation Status of FAW, 2004-2008
Chart Operation Status of Shanghai Volkswagen, 2004-2008
Chart Operation Status of CHERY, 2004-2008
Chart Predictions on Chinese Passenger Vehicle Outputs, 2009-2012

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