

China Bus Industry Report, 2015-2018

Aug.2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2014-2015, although macro-economy would have certain impact on bus market, city buses, new energy buses, and light-duty buses, which were driven by downstream market, presented a rise in demand, thus leading to growth of overall bus market in China. In 2014, the sales volume of buses (including bus chassis) in China came to 606,900 vehicles, up 8.37% from a year earlier.

In 2014, the new energy bus became a new sport light in bus market, with sales volume hitting 27,000 vehicles, up 160% from a year earlier. In terms of power type, the plug-in hybrid bus gained in popularity in the market with its lower prices and high cost performance. And therefore it accounted for the largest share in new energy bus market, at 47.5% in 2014. Spurred by technology maturity and polices, the battery electric bus developed rapidly, representing 47% in 2014, an increase of 31 percentage points from 2013. However, the ordinary hybrid bus, which was not brought into the national subsidy list, occupied an increasingly lower market share, to 5.5% in 2014. It is expected to gradually withdraw from the market in the future.

In 2014, school bus market failed to meet market expectations, with the sales volume dropping by 14.9% year on year. In 2014, there were a total of 38 school bus manufacturers in China,

a decrease of 11 from the end of 2012. That was because there had been no encouraging policies and financial support, so that quite a few enterprises chose to retreat from the market. In October 2014, the Ministry of Education brought school bus safety under control as major educational emergencies, which can be viewed as a breakthrough in school bus policy, thus bolstering the market. In the first months of 2015, the sales volume of school buses increased by 22% year on year on year to 9,400 vehicles. The market is expected to grow rapidly if good policies are introduced in the future.

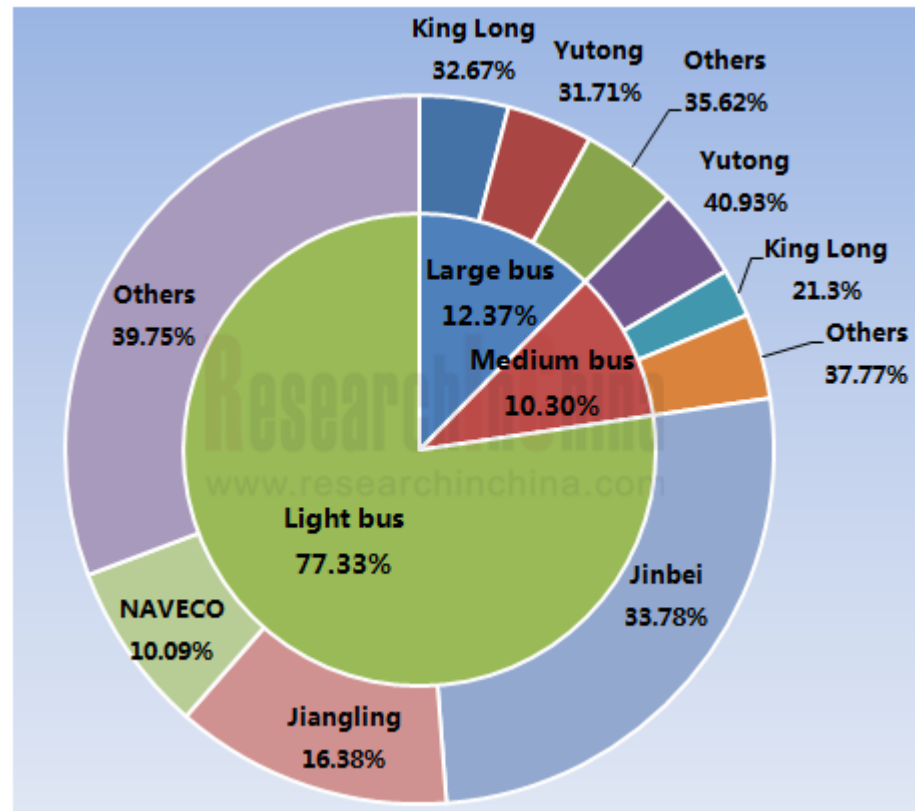
As the largest large and medium-sized bus manufacturer in China, Yutong Bus sold 27,398 and 7,531 large-sized buses respectively in 2014 and Jan.-May 2015, which accounted for the market share of 33.65% and 31.71%, separately; the sales volume of medium-sized buses totaled 25,880 vehicles and 8,552 vehicles, respectively, with the market share of 41.28% and 40.93%. Yutong took the leading position in many bus market segments, For example, the company made up a market share of over 30% in school bus market and of over 25% in new energy bus market. In May 2015, Yutong Bus displayed its high-end medium-sized business bus—T7, which is positioned as high and mid-end business bus. In future, the product is expected to break the monopoly of Toyota Coaster in this market.

Shenyang Jinbei Automotive, the largest light-duty bus producer in China, saw the sales volume of 116,500 and 54,000 light-duty buses respectively in 2014 and Jan.-May 2015, which accounted for the market share of 30.24% and 33.78%. In the field of light-duty bus, the company's leading products are HAISE and Grace. While consolidating the leading position in light-duty bus, Jinbei is extending its business to car market. At present, a complete product lineup centering on cars, light-duty buses and light-duty trucks is taking shape.

The report mainly deals with the following:

- Market size, market structure, competitive landscape, import and export, and trends of China's overall bus market (including chassis);
- Market size, market structure, and competitive landscape of large, medium, and light bus market in China;
- Market size, market structure, competitive landscape, and prospects of school buses in China;
- Market Size, competitive landscape, related policies, technology roadmap, and industrial investment of new energy buses in China;
- China's bus industry chain, including the supply relationship of main upstream spare parts (transmission, wheel hub, and new energy batteries) and downstream market demand;
- Development of Chinese bus manufacturers, including their financial data, bus production and sales, new energy bus business, capacity, cost structure, latest developments, etc.

Competitive Landscape of Bus Market in China, Jan-May 2015



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