Inside China: Understanding China’s Current and Future Automotive Industry

“Focus on the Future”
UM Automotive Research Conferences

WELCOME!

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China Vehicle Sales

Year 2010: 18,061,900
Year 2011: 18,505,100
Year 2012: 19,306,400
Year 2013: 21,984,100
2013 Top Ten Vehicle Sales

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FAW VW</td>
<td>1,607,076</td>
</tr>
<tr>
<td>2</td>
<td>SAIC GM Wuling</td>
<td>1,600,550</td>
</tr>
<tr>
<td>3</td>
<td>Shanghai GM</td>
<td>1,575,000</td>
</tr>
<tr>
<td>4</td>
<td>Shanghai VW</td>
<td>1,525,000</td>
</tr>
<tr>
<td>5</td>
<td>Beijing Hyundai</td>
<td>1,030,808</td>
</tr>
<tr>
<td>6</td>
<td>Dongfeng Nissan</td>
<td>926,229</td>
</tr>
<tr>
<td>7</td>
<td>Changan Ford</td>
<td>682,686</td>
</tr>
<tr>
<td>8</td>
<td>Great Wall</td>
<td>627,436</td>
</tr>
<tr>
<td>9</td>
<td>FAW Toyota</td>
<td>554,661</td>
</tr>
<tr>
<td>10</td>
<td>Geely</td>
<td>549,393</td>
</tr>
</tbody>
</table>
2013 Top Ten Joint Venture Sales

GM: 3175000
VW: 3125000
Hyundai: 1030000
Nissan: 926200
Toyota: 857800
Honda: 756900
Ford: 679000
Kia: 546800
Audi: 492000
BMW: 390700
2013 Top Seven Chinese Independent Manufacturer Sales

- Great Wall: 627436
- Geely: 549393
- BYD: 506189
- Chery: 443944
- Jianghuai: 203498
- Lifan: 153462
- Haima: 152753

Bar chart showing sales figures for each manufacturer.
2013 Chinese Buying Trends

- Study performed by SINOTRUST, a Chinese marketing solution supplier that provides consulting services.
- Web survey with 18,322 responses
- What we don’t know: identity of respondents and age range
- The focus of the study is to examine three groups: Potential first time buyers, buyers who will purchase an additional vehicle, and buyers who will replace their current vehicle.
2013 Chinese Buyers: Purchase Intent

- First buy: 72%
- Buy more: 16%
- Replacement: 12%
2013 Chinese Buyers: Types of Vehicles to be Purchased

First buy (N=12648)  Second buy (N=2064)  Replacement (N=2893)
2013 Chinese Buyers: Reasons for Purchase

- First buy (N=12648)
- Second buy (N=2064)
- Replacement (N=2893)

Reasons for Purchase include:
- Travel to work
- Leisure
- Take children to school
- Business use
- Cargo delivery
- Vehicle Rental
- Other

UMTRI
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Slides will be available on the website during the weekend

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