Intesco Research Group

# LIGHT MOTOR VEHICLES AND MARKET OF LIGHT MOTOR VEHICLES


MOSCOW 2014

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# RESEARCH METHODOLY

**Subject of research:**

RUSSIAN AND WORLD LIGHT MOTOR VEHICLES

**Goal of research:**

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT UNTIL 2016

**Regions of research:**

RUSSIA

REGIONS OF RF

**Main blocks of research:**

WORLD MARKET

ANALYSIS OF RETAIL SALES

RUSSIAN MARKET VOLUME

MARKET TRENDS

ADJACENT MARKETS

STATE REGULATION

LARGEST PLAYERS IN THE MARKET

MOTOR PASSENGER CAR PRODUCTION IN RUSSIA

LARGEST RUSSIAN PRODUCERS

LIGHT CAR EXPORT

LIGHT CAR IMPORT

PRICES FOR MOTOR PASSENGER CARS

DEVELOPMENTAL FORECAST OF MOTOR PASSENGER CAR MARKET UNTIL 2020

**Profiles are made for the following largest Russian car producing enterprises:**

«VOLKSWAGEN GROUP RUS» LLC

«TOYOTA MOTOR» LLC

«AVTOVAZ» OJSC

«NISSAN MANUFACRURING RUS» LLC

«FORD SOLLERS HOLDING» LLC

**The sources of information, which are used in the research:**

Federal State Statistics Service

Ministry of Economic Development of RF

Ministry of RF Transport

Federal Customs Service

Federal Tax Service

Industry experts' estimates

Federal target programs and subprograms

Printed and electronic publications of the branch

Data of state structures (ministries and agencies), industry associations, unions, dealing with the development of construction and building industry

**The research contains 68 schedules, 84 diagrams, 81 tables and 1 scheme.**

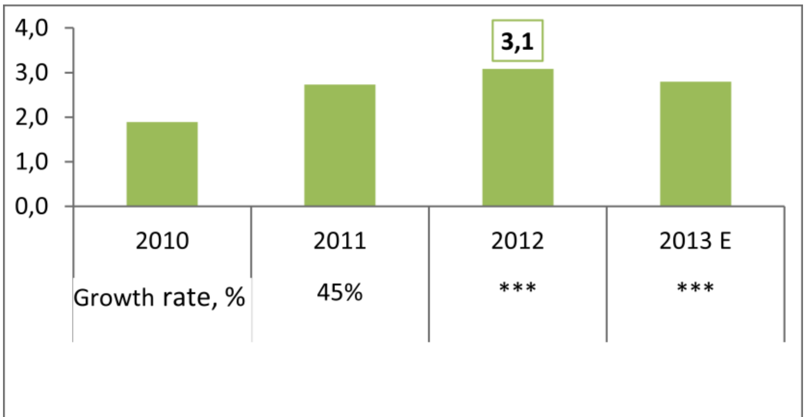
# EXTRACTS FROM RESEARCH

## *CHAPTER 5*

## *RUSSIAN MARKET VOLUME*

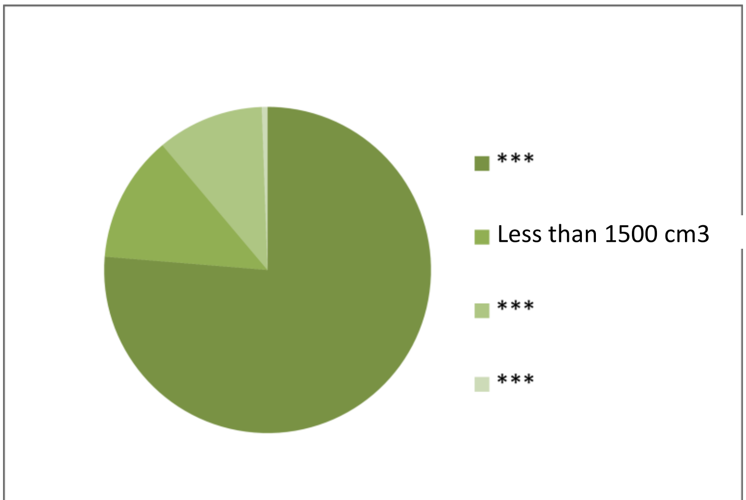
In *** terms the increase in the market in the period from 2010 to 2013 was a little smaller in value *** – ***% versus 80%, but the growth by *** times is hardly insignificant. In 2012 the market volume exceeded 3 mln. cars, but in 2013 it amounted to *** mln. vehicles, having decreased to ***%.

Due to the fact that in 2013 both the *** (***), and *** (***), decreased, the market volume in real terms decreased compared to the same period last year by *** ths. pcs of production. The export was increasing on the entire time interval from ***to*** and in 2013 it amounted to *** ths. cars.




Dynamics of the Russian motor car market in real terms in 2010 - 2013, mln. pcs

From 2010 to 2012 an increase in the share of diesel cars in the market by 3 percentage points was observed - from ***% to ***%, due to ***. The number of filling stations offering high-quality diesel fuel also increased.



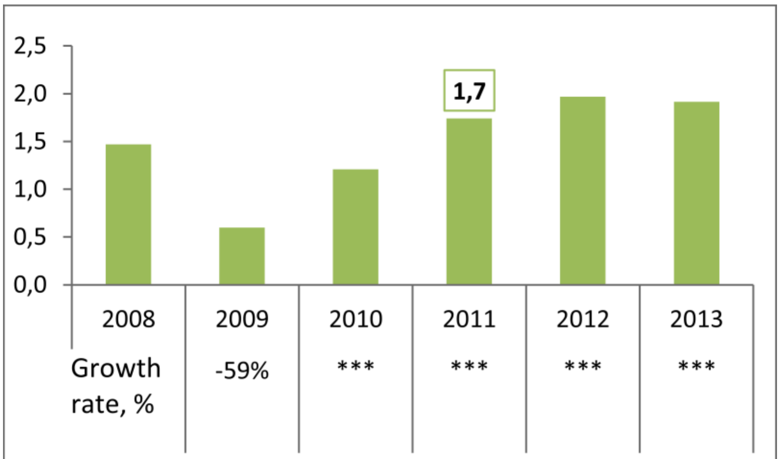

Structure of the Russina market of motor passenger cars by product types in 2012 г., %

# CHAPTER 10

## MOTOR PASSENGER CAR PRODUCTION IN RUSSIA

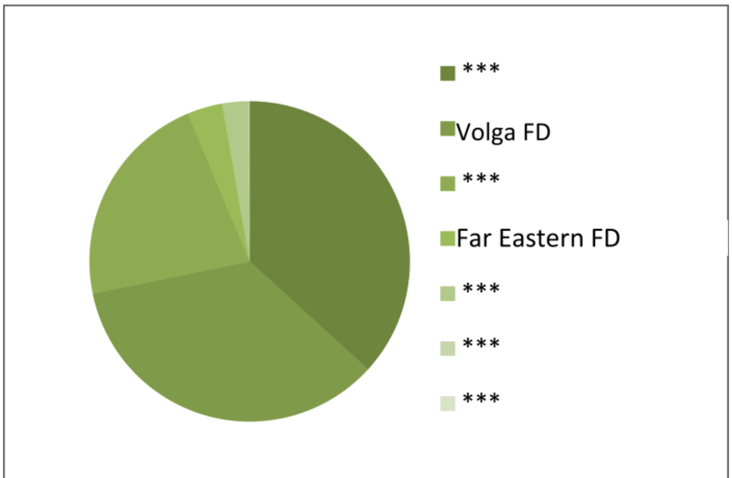
The Russian car production recovered from the crisis fast enough and in 2011 it exceeded those figures of 2008, and by 2012 it reached the level of *** mln. pcs. In 2013 there was a ***% decline in production to the level of *** mln. pcs, that is, however, by ***% more than in 2008.

The minimum production volume was recorded in *** 2009 in the period of 2008 - 2013, when it amounted to *** pcs, the maximum one – in *** – ***. Also there was an untypical *** in the production to 138,5 ths. pcs in *** 2013.




**Volume dynamics of the Russian motor passenger car production in 2008 - 2013 , mln. pcs**

The main production volume of passenger cars in Russia was located in 3 federal districts in 2013 – *** (***%), the Volga (***%) and *** (22%). The Far Eastern and the *** FDs amounted to ***% and 3% in the structure of production.

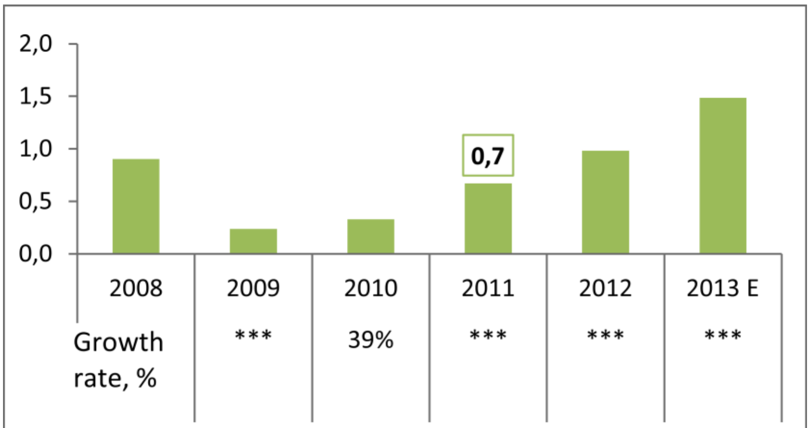



**Structure of the Russian motor passenger car production by federal districts in 2013, %**

# *CHAPTER 12*

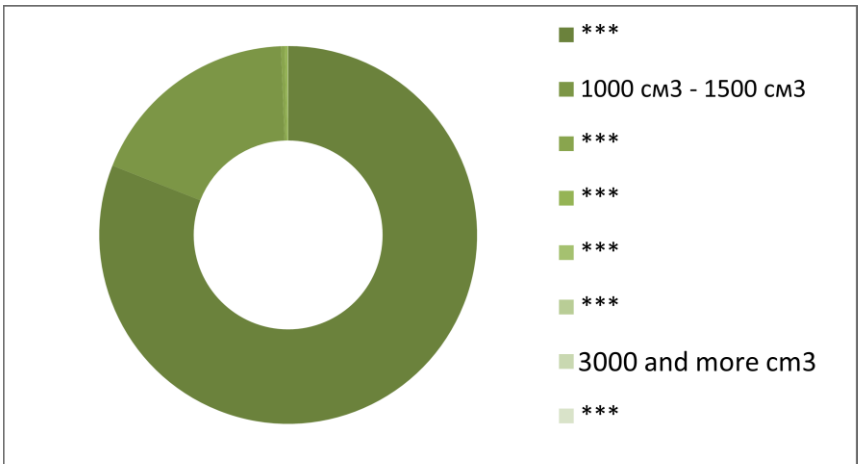
## *RUSSIAN EXPORTOF LIGHT MOTOR CARS*

Export volumes of passenger cars in money terms didn't only annually increased since 2010, but also surpassed that level of *** by ***% in *** when the value of exported goods amounted to almost 1,5 bln. USD.




**Volume dynamics of the Russian motor passenger car export in money terms in 2008 - 2013*, ths. USD**

From 2010 to 2013 *** played a significant role in the structure of the Russian export of cars and at the beginning in 2012 it accounted for more than ***% of the total number of vehicles sold abroad (*** ths. pcs from *** ths. pcs in 2012 and *** ths. pcs from *** ths. pcs in 2013). When accounting *** it becomes apparent that exports did not decrease since 2012, as it follows from ***, but continued to grow until 2013, when ***, that is 3 times higher than in ***. Based on this, we can conclude that the numbers of 2013 reached the level of ***.

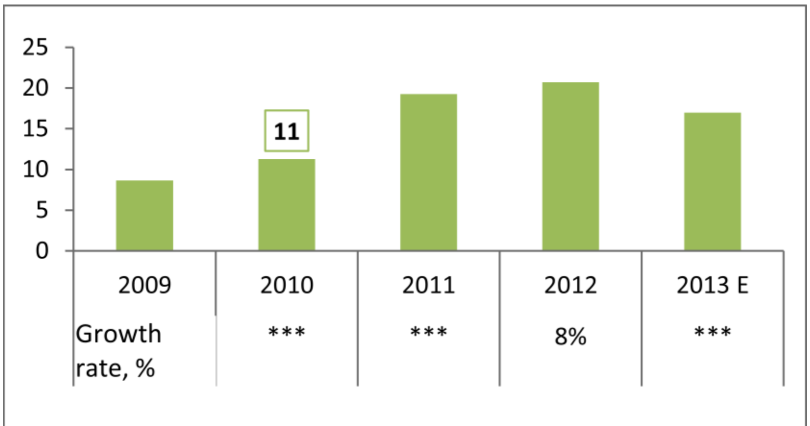



**Structure of the Russian motor passenger car export in real terms by product types in 2012, %**

# *CHAPTER 13*

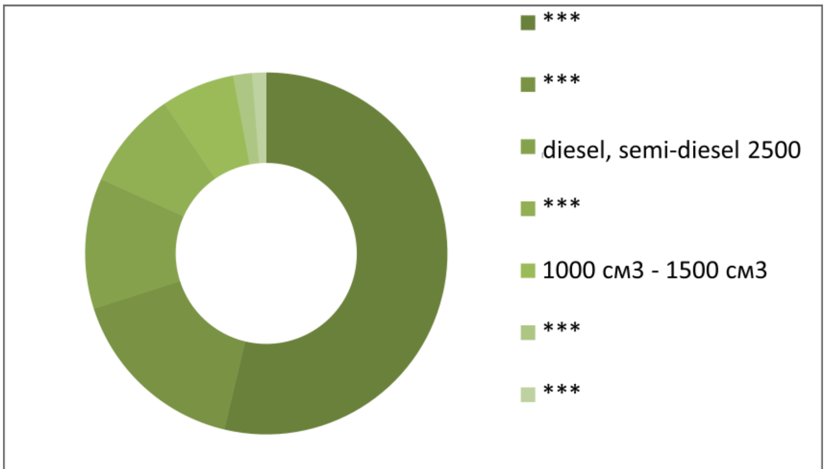
## *RUSSIAN IMPORTOF LIGHT MOTOR CARS*

The import volumes in money terms were also increasing from 2009 to 2012, and in 2013 fell by ***%, having amounted to nearly *** bln. USD. A higher rate of growth in *** as compared to that in real terms should be noted – ***% vs. 49%. In 2012 the cost of imports reached its peak and exceeded *** bln. USD, that is by almost 2,5 times more than in.




**Volume dynamics of the Russian motor passenger car import in money terms in 2009 - 2013*, bln. USD**

As for the cost structure of the import in 2012, a relatively higher cost of *** should be noted: ***% of all funds were necessary to pay 16% of the volume in money terms, while ***% *** cars amounted to ***% of the total costs.




**Structure of the Russian import of motor passenger cars in money terms by product type in 2012, %**

# LIST OF SCHEDULES, DIAGRAMS, TABLES AND SCHEMES

# INFORMATION ABOUT INTESCO RESEARCH GROUP

**INTESCO RESEARCH GROUP** is the analytical group, having its principal directions of activity in development of high-quality business plans, feasibility studies and marketing researches of both Russia's and regional markets of RF. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven research and development methods. When conducting marketing researches and developing the business plans the group applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “MAXIM”, “Partner: myasopererabotka”, “Moe delo. Magazin”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Tsenovik”, “RBK daily”, “Unipack.Ru”, etc.

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