



**Intesco
Research
Group**

LIGHT MOTOR VEHICLES AND MARKET OF LIGHT MOTOR VEHICLES



MOSCOW 2014

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RESEARCH METHODOLOGY

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 MANUFACTURING 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.

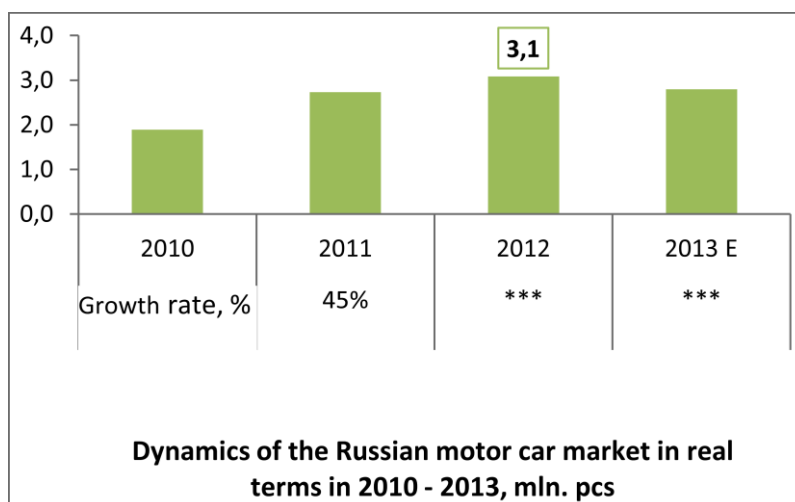
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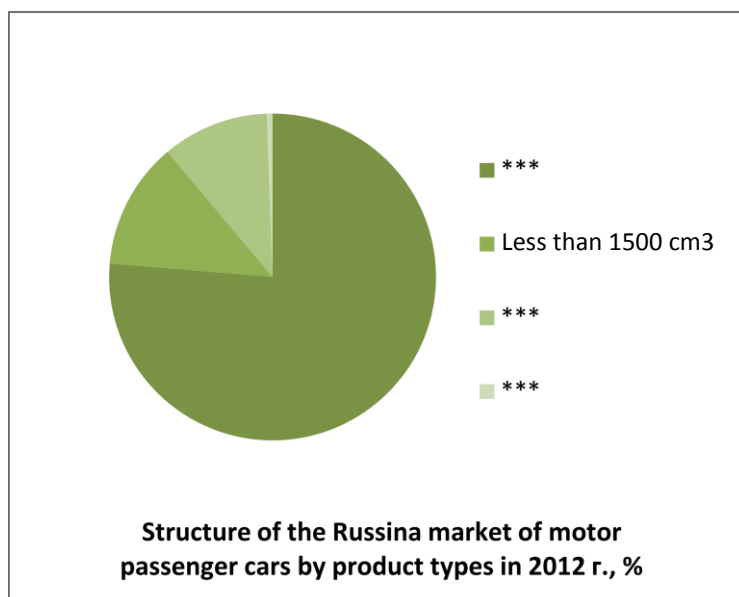
RUSSIAN MARKET VOLUME

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.



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.

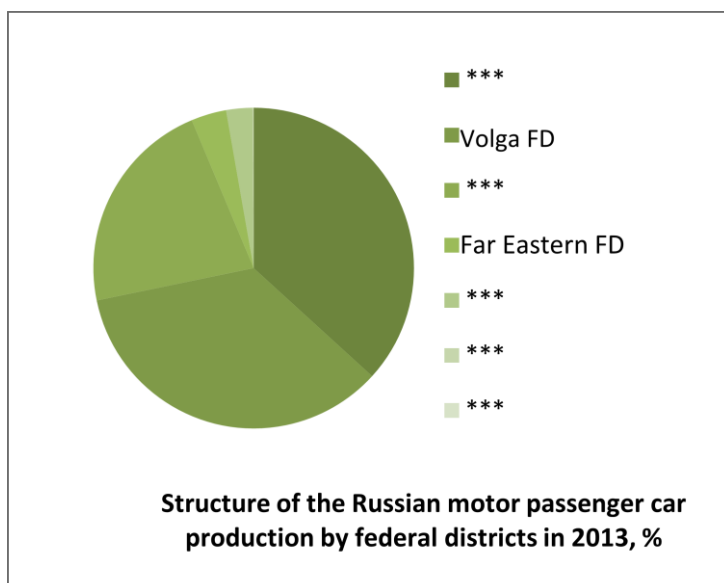
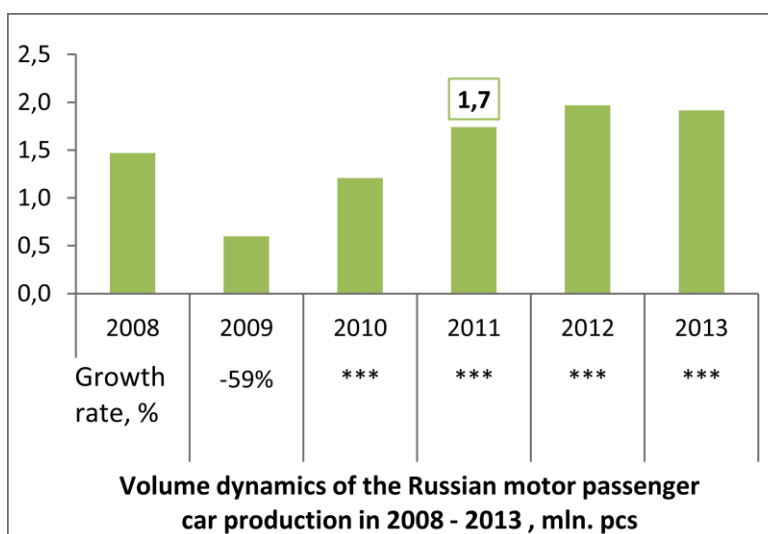


CHAPTER 10

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.



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.

CHAPTER 12

RUSSIAN EXPORT OF LIGHT
MOTOR CARS

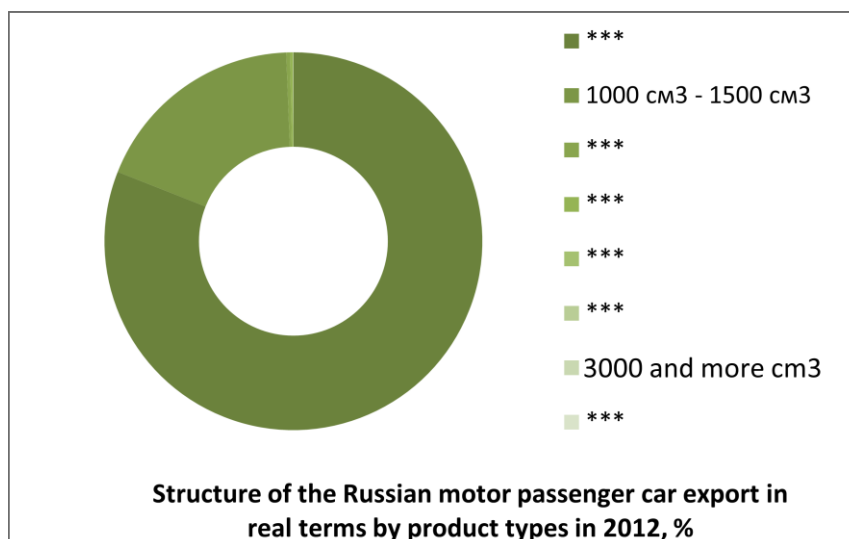
Export volumes of passenger cars in money terms didn't only annually increased since 2010, but also surpassed that level of *** by ***% in *** when the value of exported goods amounted to almost 1,5 bln. USD.

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



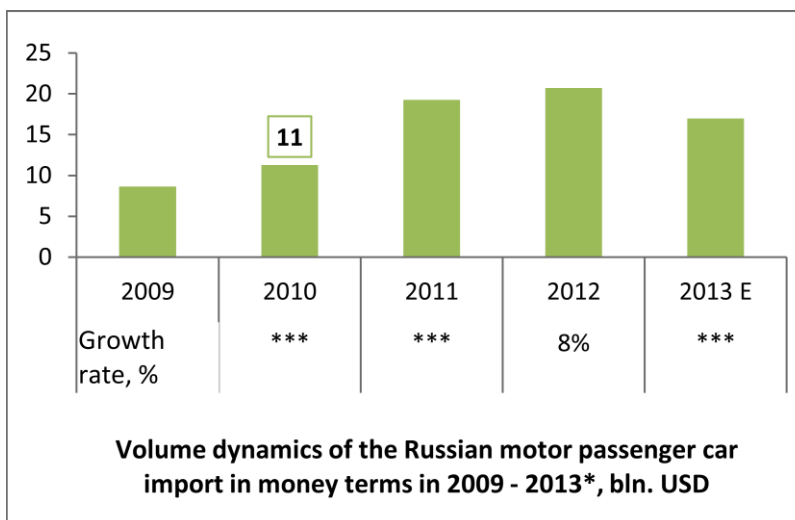
from ***, but continued to grow until 2013, when ***, that is 3 times higher than in ***. Based on this, we can conclude that the numbers of 2013 reached the level of ***.



CHAPTER 13

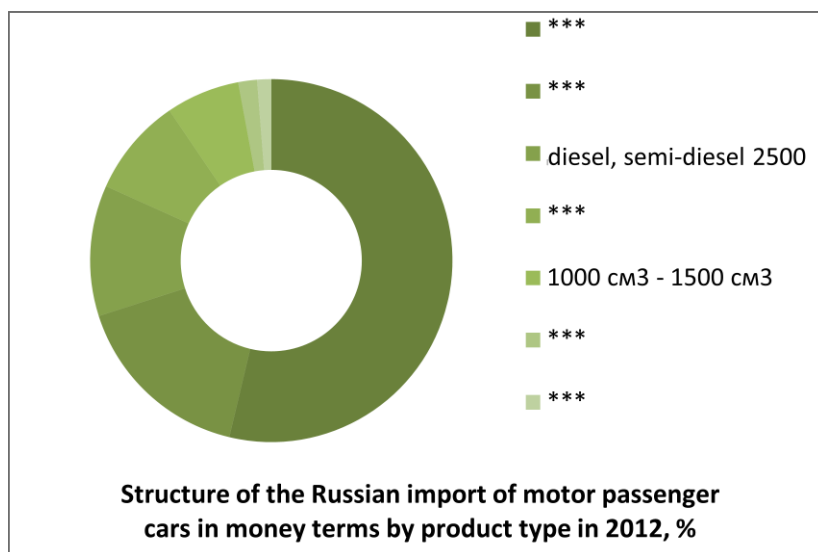
RUSSIAN IMPORT OF LIGHT
MOTOR CARS

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.



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.



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