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**ASM Holding, OAO
MARKET RESEARCH CENTRE**

**BUS MARKET
in the Russian Federation, 2001-2012**

Statistical Review



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Introduction

Market Research Centre at ASM Holding presents in this survey dynamics of bus production and bus market development in the Russian Federation in the period from 2001 to 2012.

The research jobs were performed by ASM Holding with the use of data received from OEMs, Federal Customs Service, State Automobile Inspection (GAI), Association of Russian Automakers (OAR) and some other organizations. The survey includes 20 tables and 5 diagrams.

Table 1 gives an extract from the Association of Russian Automakers' standard StOAR-001-2006 (adopted on 27 March 2006) defining classification of buses in Russia.

Table 2 shows dynamics of bus production (both domestic and foreign models) in Russia and Belarus in 2001-2012. Analysis of this table reveals Russia's bus output growth through the period 2001-2007. Annual growth rate was +XX% in 2001, +XX% in 2002, and +XX% in 2003. The growth slowed down in the next 3 years (2004-2006) to annual rate XX% to XX%. In 2007, another growth of bus production was noted at a significant rate +XX%. Regrettably, positive dynamics were interrupted in 2008 by the global economic crisis that has severely affected Russia. The crisis caused decline of demand for buses, which led to a fall of their output by XX%. In 2009, bus output fell another XX% on the year, and it was only in 2010 that bus production resumed growth (+XX% year-on-year). However, total bus output by the end of the first decade has not even reached the 2001 level. In 2011, bus production in Russia rose another XX%. In 2012, the bus output was further up XX% and surpassed the 2001 level.

Table 3 shows dynamics of foreign-branded bus production in Russia. Output of foreign models started only in 2002 and grew very slowly. Until 2007, the share of foreign models in Russia's total annual bus production did not exceed XX%. However, starting from 2007, output of foreign bus models (mainly of extra-small "OM" and small "M" classes) began to grow, and their share reached XX% in 2007, XX% in 2008, XX% in 2009, XX% in 2010, and XX% in 2011, then slightly declined to XX% in 2012. However, it is expected to reach XX% of the total bus output in 2013-2015.

Table 4 shows dynamics of bus production in Russia and Belarus by class. Mostly in demand are extra-small "OM" class buses, which cover XX% of the total bus output in the recent 4 years. The small "M" class also strongly retains XX% share of the total bus output. Production of medium "S" class buses that took XX% of the total output in the beginning of the last decade is steadily growing and has reached XX% in 2008-2012. Large "B" class buses are in demand in cities and take XX% of the total output. Higher demand is partly met by imports, especially by coaches with better consumer performances. Production of "B" class buses grew with both Russian and Belarusian manufacturers in 2011-2012. Extra large "OB" class buses only appeared in Russian production in 2003 and started a slow growth since 2007 (with a share of XX% in 2007; XX% in 2008; XX% in 2009; XX% in 2010; XX% in 2011; XX% in 2012; and a slight further growth being expected at the expense of three-axle rigid-body buses).

Table 5 shows dynamics of Russian sales of buses manufactured in Russia and Belarus. Due to the crisis, bus sales were down XX% in 2008 and fell another XX% on the year in 2009. The recovery of the market started in 2010 with sales up XX% and continued in 2011 (up XX%) and

2012 (up XX%). However, the sales have not reached even the 2002 level. The market share of foreign-branded models assembled in Russia was permanently increasing till 2012: from XX% in 2008 to XX% in 2009, XX% in 2010, and XX% in 2011. In 2012, their share shrank to XX% but it is expected to resume the growth and reach XX% of the market within two or three years, mainly thanks to expansion of new minibus assembly operations.

Table 6 illustrates sales of all buses on the Russian market. The table shows domestic models, foreign models of Russian assembly, bus imports from the Republic of Belarus, and imports from other countries, specifying both new buses and used ones. Since 2008, the market share of domestic models is decreasing in favour of imports and locally assembled foreign models. Among the imports total, the share of new buses surpassed that of used vehicles in 2007, and this trend has been continuing since then.

Diagram 1. Russian bus market structure by vehicle origin, 2001-2012.

Table 7 shows dynamics of bus sales on the Russian market in value terms, broken down by domestic models, foreign models assembled in Russia, and imported buses.

Table 8 shows dynamics of bus sales on the Russian market by class and origin. The most popular are extra-small “OM” class buses (minibuses) counting for XX% of all sales. The small “M” class covers XX% of the market. The dominance of the OM and M class buses on the market is expected to remain a trend. Growth of the share from XX% to XX% is noted with medium “C” class buses.

Table 9 shows bus imports in Russia by class. Extra-small bus imports were decreasing towards 2010, however 2010 imports revealed nearly ten-fold growth year-on-year, mainly on the account of Korean buses. In 2011, imports of this bus category rose another XX%. However, “OM” class imports declined XX% in 2012. In the future, it is expected that along with establishing production of this class foreign models in Russia, imports will further slow down. “M” class bus imports are fairly well balanced around the level of a XX% share of the imported bus market. Class “S” bus imports are limited to XX% and going to further decrease. Mostly in demand are large “B” class buses for mass municipal transport. Imports of this class buses were continuously growing to have reached XX% of all bus imports in 2007.

Diagram 2. Russian bus imports structure by class, 2004-2012.

Table 10 shows dynamics of Russian sales of buses manufactured in Russia and imported from Belarus, by bus function. The dominating share, more than XX%, is taken by minibuses. “OM” class minibuses also include some “M” class vehicles, which represent lengthened versions of “OM” class minibuses. Such vehicles are widely used as taxi buses, ambulances, mobile offices and company fleet transport. Another XX% of the market is taken by city buses of other than “OM” classes. Before 2005, inter-city and tourist coaches were taking less than XX% of the bus market; then the demand began to grow, and the share of coaches reached XX% - a level supposed to be maintained in the foreseeable future.

Diagram 3. Russia-made and Belarus-imported bus market structure by bus function, 2004-2012.

Table 11 shows bus imports in Russia in 2007-2012 as per data of the Federal Customs Service. The customs statistics show somewhat lower figures in comparison with data of the State Automobile Inspection (GAI). This is because the official customs data do not reflect imports by natural persons, while GAI registers vehicles imported by both corporate bodies and private buyers.

Table 12 shows market shares of bus manufacturers based in Russia. The major part of the market is taken by GAZ brand, whose share was XX% in 2006, XX% in 2008, and 29.XX% in 2009. Its share further squeezed to XX% in 2010 and to XX% in 2011, but increased again to XX% in 2012. The second leading position on the market was occupied, until 2011, by UAZ. A good demand for UAZ minibuses is based on their outstanding off-road performance, especially in what concerns ambulances used in remote areas. Nevertheless, the market share of UAZ minibuses decreased from XX% to XX% in the period 2001-2010, and it shrunk to XX% in 2011. As a result, UAZ stepped down to the 3rd position, yielding the second spot to PAZ. However, UAZ regained the second spot in 2012 with a market share of XX%. PAZ buses (medium “S” class) take XX% of the market.

Diagram 4. Market shares of major bus manufacturers in Russia, 2001-2012.

Table 13 shows total Bus Parc in Russia, 2001-2012. The parc is dominated by domestic models (XX% in 2012). The share of Russia-made foreign models is still not very large – only XX%. The rest are imported buses, whose parc was down XX% in 2012 vs. 2009, which can be explained by write-off of many used buses purchased in 2004-2007.

Table 14 shows Bus Parc in the Russian Federation by Federal District. The majority of the buses in use are concentrated in Central European part of Russia, while there is insufficient bus parc in Urals, Far East and partly in Siberia which is related to the number and quality of hard-surface roads, as well as to the population size.

Table 15 shows Bus Parc in Russia by class, the breakdown completely corresponding to bus sales on the Russian market commented with the foregoing tables.

Table 16 shows data on bus rejection from Russia’s fleet. In general, percentage of annual write-off of rejected end-of-life vehicles is about XX% a year. It means that the average age of a bus in Russia’s parc is over 14 years. Taking into account dominance of “OM” (Extra Small) and “M” (Small) class buses, and replenishment of the parc with many imported used buses, such low right-off percentage will lead to further ageing of the bus fleet.

Table 17 shows age of Russia’s bus fleet over the last 12 years. Average share of 5 and less year-old buses in that period was XX%, which indicates a very slow renewal of the fleet. The 10 and over year-old fleet is permanently increasing despite of launch of new minibus production facilities in the country. This age segment covered XX% of the bus parc in 2012 vs. XX% in 2010. It should be noted that XX% share of the parc is taken by “OM” and “M” class buses (minibuses) whose lifetime before rejection is 10-12 years.

Diagram 5 shows length of road network in Russia. Unfortunately, construction of roads is carried very slowly. Thus, the length of paved roads rose only XX% for the recent 16 years, while the length of motorways providing main freight flows is kept at 30,000 km and even decreased to 29,000 km in 2010. Meanwhile, the total vehicle parc in Russia more than doubled since 2000.

Table 18 shows passenger traffic by mode of public transport. Bus transport covers more than XX% of all personal travels. The volume of bus transport has been gradually increasing over the last 11 years, and it has reached XX% share in 2010 vs. XX% in 2000. However, despite the growth of bus mobility of the population, it still lags behind the EU criteria of XX%.

Table 19 shows passenger turnover by mode of public transport. Unlike passenger traffic (number of persons), passenger turnover (number of passenger-km's) has decreased by nearly XX% over the last 12 years. This can evidently be explained by insufficient fleet of long-distance tourist coaches and few motorways where such coaches could be efficiently used.

Table 20 shows general specifications of bus base models manufactured in Russia and Belarus. Along with domestic models, the table shows technical specifications of foreign models being assembled in the Russian Federation, as well as foreign models imported from non-CIS countries.

Attachment: Table1 on 1 page

Table 2 on 9 pages

Table 3 on 4 pages

Table 4 on 1 page

Table 5 on 8 pages

Table 6 on 1 page

Table 7 on 1 page

Table 8 on 1 page

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Table 18 on 1 page

Table 19 on 1 page

Table 20 on 7 pages

Diagram 1 on 2 pages

Diagram 2 on 1 page

Diagram 3 on 1 page

Diagram 4 on 2 pages

Diagram 5 on 1 page

Table 1

Association of Russian Automakers Standard StOAR-001-2006

Classification of Buses

Class (length, m)	Class designation	Typical examples of buses
Extra small (up to 6.0 m)	OM (Cyrillic OM) OM1 – city and suburban buses	OM1: GAZ-2217 Sobol, 3221 GAZelle; UAZ-2206, 3962; Kia Pregio; Ford FT-260, 300, 330; Fiat Scudo; VW Transporter; IVECO Daily 29; MB Sprinter 208, 308,316; Nissan Interstar; Opel Movano; Peugeot Boxer; Renault Master; Toyota HiAce.
Small (6.1-8.0 m)	M (Cyrillic M) M1 – city and suburban buses M2 – inter-city and tourist coaches	M1: ZIL-3250; GAZ Valdai; PAZ-32053, 3206, 3203, 3204, 3237; KAVZ-3976; SemAR-3234; MS Sprinter 616 M2: Volzhanin-3290; MAZ-256; Erust Auwarter Teamstar Migi.
Medium (8.1 – 10.0 m)	S (Cyrillic C) S1 – city and suburban buses S2 – inter-city and tourist coaches	S1: PAZ-4234; KAVZ-39765, 3977; MARZ-4219; LAZ A-1414; MB Vario; TAM Marbus B4-080. S2: PAZ-4230 Aurora; EA KFB Travel Skote; Erust Auwarter Clubstar; Trisbus Midys.
Large (10.1 – 12.0 m)	B (Cyrillic B) B1 – city and suburban buses B2 – inter-city and tourist coaches	B1: LiAZ-5256, 5292; GoIAZ-5291; PAZ-5272; NefAZ-5299; MARZ-5277; LAZ A-183; MAZ-103; Ikarus-415; Scania OmniLink; MB Citaro; MAN NL 263; Volvo 7700. B2: GoIAZ-5290; NefAZ-52991; MAZ-251; LAZ-52081; Ikarus E98; Irizar PB12; MAN Lion's Star; MB Turismo; Neoplan Evroliner; Volvo 9700.
Extra large (12.1 – 18.0 m)	OB (Cyrillic OB) OB1 – city and suburban buses OB2 – inter-city and tourist coaches	OB1: LiAZ-6212, 6213; Volzhanin-6212; Ikarus-435; MAZ-105, 107; Volvo 7700, 9900; OB2: Setra Multiclass; Berkhov Axial-100; Bova Futura; Irizar PB1337; MAN Lion's Top Coach; MB Traego M; Neoplan Skyliner; Volvo 9900.
Special and work-team buses*	SV (Cyrillic CB)	KAVZ-42244; Ural-3255; NefAZ-4248, 4211

*Buses on chassis of KAMAZ and Ural off-road trucks for use at petroleum/gas fields, geologic parties, etc. (no likes beyond Russia).

Note:

The length of particular models in bus classes may vary within 3% of the range limits, given nomination of the category by manufacturers.

Table 2

Dynamics of bus production in Russia and Republic of Belarus

units

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
UAZ, Ulyanovsk																	
UAZ-3962 (4x4)	Ambulance																
UAZ-2206 (4x4)	Minibus																
Total:																	
Sollers Yelabuga																	
Fiat Ducato	Minibus																
Fiat Transit	Minibus																
Total:																	
GAZ, Nizhny Novgorod																	
GAZ-2217 Sobol	Minibus																
GAZ-3221 GAZelle	Taxi bus																
Maxus LWB	Minibus																
Total:																	
AMO ZIL, Moscow																	
ZIL-3250	Suburban bus, city bus																
Total:																	
PAZ, Pavlovo																	
PAZ-3237	City bus																
PAZ-3203; 3204	City bus, suburban bus																
PAZ-32053; 32054	City bus, suburban bus																
PAZ-3206 (4x4)	Suburban bus																
PAZ-4230; 4234	Suburban bus, inter-city																

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
PAZ-3010 (VW based)	Taxi bus																
GolAZ-3030 (Ford)	Taxi bus																
Total:																	
Small-Series Auto Plant (ZAMS), Nizhny Novgorod																	
ZAMC-322131; 322133	Special minibuses, GAZelle-based																
Total:																	
KAVZ, Kurgan																	
KAVZ-3244	Suburban bus																
KAVZ-3976; 32081	City bus, suburban bus																
KAVZ-4235	Suburban bus, inter-city																
KAVZ-4238	Suburban bus																
KAVZ-4239	City bus																
KAVZ-4230	Suburban bus, city bus																
KAVZ-4224 and modifications	Work-team bus																
Total:																	
Likinsky Autobus Plant (LiAZ), Likino-Dulevo																	
LiAZ-5256	City bus, suburban bus																
LiAZ-5292; 5293	City bus																
LiAZ-6312; 6213	City bus																
LiAZ-5256-28	Tourist coach																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year										
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Tushino-Avto, Moscow																
PAZ-3237-01	City bus, suburban bus															
LiAZ-5256-45	City bus, suburban bus															
LiAZ-6212; 6213	City bus															
Volzhanin-6270	City bus															
GolAZ-6228	Suburban bus															
LiAZ-52922; 52937	City bus, suburban bus															
MAZ-103465;103565	City bus, suburban bus															
MAZ-107066;107466	City bus															
Total:																
Michurinsky Autobus, Michurinsk																
MARZ-4251; 4251-01	Inter-city, tourist coach															
MARZ-4219; 42191	City bus, suburban bus															
MARZ-42191-01	Suburban bus															
MARZ-5277; 5277-01	City bus, suburban bus															
Total:																
NefAZ, Neftekamsk																
NefAZ-4208; 42111; 42112	Work-team bus, special bus															
NefAZ-5299; 5299-01	City bus, suburban bus															
NefAZ-5299-08	Inter-city															
NefAZ-52991	Tourist coach															
NefAZ-3299	City bus,															
Total:																

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year										
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
AZ Ural, Miass																
Ural-3255; 32551; 32552	Work-team bus															
Total:																
NPP SemAR, Nizhny Novgorod Region																
SemAR-3234	Ambulance															
Total:																
Vika LTD, Kurgan Region																
KAVZ-32441	City bus															
Total:																
Rodnikovsky Mashzavod, Ivanovo Region																
Rodnik-32301	City bus, suburban bus															
Total:																
Samotlor-NN, Nizhny Novgorod Region																
Iveco Daily	Ambulance, city bus															
Mercedes Spinter	Taxi bus															
Ford Transit	Minibus															
Volkswagen LT	Ambulance															
Renault Master	Ambulance															
Citroen Jumper	Ambulance															
Peugeot Boxer	Ambulance, minibus															
Total:																

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
ST Nizhegorodets, Nizhny Novgorod																	
Ford Transit, Iveco Daily, Fiat Ducato, Peugeot Boxer	Minibus																
Total:																	
RZGA (Rostov Truck Plant), TAGAZ, TAGAZ Taganrog Affiliate HT Auto Rostov Region																	
Hyundai County	Minibus																
Hyundai Aero Town	City bus,																
Total:																	
Rostov Bus Plant, Rostov Region																	
RoAZ-5236	City bus																
Hyundai County	Minibus																
Total:																	
Scania – Peter, St. Petersburg																	
Scania Omnilink CL 94UB	City bus Suburban bus																
Scania Omniline IL 94 iB	Inter-city, Tourist coach																
Total:																	
EvoBus Russland, Kolomna																	
Mercedes Sprinter-413	Taxi bus																
Total:																	
TransAlfa Electro Vologda																	
VMZ-4252 Olymp	City bus																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
PROMTEKH																	
Nizhny Novgorod Region																	
GAZ Sobol	Minibus																
GAZ GAZelle	Taxi bus, City bus																
UAZ-3962 and modifications (4x4)	Minibus																
Ford Transit	Minibus																
Volkswagen Crafter and modifications	Minibus																
Peugeot Boxer and modifications	Minibus																
Other foreign models	Minibus																
Total:																	
OTHERS																	
Total:																	
Total Russia:																	
Minsk Automobile Plant (MAZ)																	
MAZ-206, 226, 241	City bus, suburban bus																
MAZ-256	Inter-city																
MAZ-103, 104, 1035	City bus, suburban bus																
MAZ-251, 152, 231	Inter-city, Tourist coach																
MAZ-203, 2031	City bus																
MAZ-105, 107, 205, 215	City bus																
MAZ-171	Ramp bus																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year												
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	
OZ Neman, Lida																		
Neman-5201, 52012																		
Neman-3232																		
Neman-42012																		
Total:																		
Total Belarus:																		
Grand total Russia and Belarus:																		

Source: Manufacturers and Russian Federation Statistics Committee (Rosstat)

Table 3

Dynamics of foreign model bus production in Russia

units

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Sollers Yelabuga																	
Fiat Ducato	Minibus																
Fiat Transit	Minibus																
Total:																	
GAZ, Nizhny Novgorod																	
Maxus "LWB"	Minibus																
Total:																	
PAZ, Pavlovo																	
PAZ-3010 (VW based)	Taxi bus																
GolAZ -3030 (Ford)	Taxi bus																
Total:																	
GolAZ, Golitsyno, Moscow Reg.																	
GolAZ-3030	Taxi bus, city bus																
GolAZ-Andare	Inter-city, tourist coach																
Total:																	
Marco Russian Buses, Pavlovo																	
Real (Hyundai County)	Taxi bus																
Andare-850	Inter-city, tourist coach																
Andare-1000	Inter-city, tourist coach																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Samotlor-NN, Nizhny Novgorod Region																	
Iveco Daily	Ambulance, city bus																
Mercedes Spinter	Taxi bus																
Ford Transit	Minibus																
Volkswagen LT	Ambulance																
Renault Master	Ambulance																
Citroen Jumper	Ambulance																
Peugeot Boxer	Ambulance, Minibus																
Total:																	
ST Nizhegorodets, Nizhny Novgorod																	
Ford Transit, Iveco Daily, Fiat Ducato, Peugeot Boxer																	
Total:																	
RZGA (Rostov Truck Plant), TAGAZ, TAGAZ Taganrog Affiliate HT Auto Rostov Region																	
Hyundai County																	
Hyundai Aero Town																	
Total:																	
Rostov Bus Plant, Rostov Region																	
Hyundai County																	
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Scania – Peter, St. Petersburg																	
Scania Omnilink CL 94UB	City bus Suburban bus																
Scania Omniline IL 94 iB	Inter-city, Tourist coach																
Total:																	
EvoBus Russland, Kolomna																	
Mercedes Sprinter-413	Taxi bus																
Total:																	
BAW Motor Corpor. Ulyanovsk Region																	
BAW Street 2245	City bus																
Total:																	
Kuzbass Avto Kemerovo Region																	
Hyundai County KUZBASS	Minibus																
Total:																	
PKF Luidor Nizhny Novgorod Region																	
Mercedes Sprinter 311, 315	Minibus, Taxi bus																
Mercedes Sprinter 411, 413, 415	Minibus, Taxi bus																
Mercedes Sprinter 515	City bus, Suburban bus																
Volkswagen Crafter-30, -35	Taxi bus																
Volkswagen Crafter-50	Minibus, Taxi bus																
Other foreign models	Minibus																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
IRITO Group Moscow Region																	
Irito Boxer L1H1, L2H2	Minibus																
Irito Boxer L3H2M16	Minibus, Taxi bus																
Irito Boxer L4H2M22	Tourist coach, city bus																
Total:																	
PROMTEKH Nizhny Novgorod Region																	
Ford Transit																	
Volkswagen Crafter and modifications																	
Peugeot Boxer and modifications																	
Other foreign models																	
Total:																	
Grand total:																	

Output figures for foreign models are included in total bus output in Russia (Table 2)

Table 4

Dynamics of bus production in Russia and Republic of Belarus by class category, 2001-2012

units

Bus class	Manufacturing country	Year											
		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
OM	Russia												
M	Russia												
	Republic of Belarus												
S	Russia												
	Republic of Belarus												
B	Russia												
	Republic of Belarus												
OB	Russia												
	Republic of Belarus												
SV	Russia												
ИТОГО	Russia												
	Republic of Belarus												
GRAND TOTAL													

Источник: данные предприятий

Table 5

Dynamics of bus sales (for buses manufactured in Russia and Belarus) on the Russian market

units

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year										
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
UAZ, Ulyanovsk																
UAZ-3962 (4x4)	Ambulance															
UAZ-2206 (4x4)	Minibus															
Total:																
Sollers Yelabuga																
Fiat Ducato	Minibus															
Fiat Transit	Minibus															
Total:																
GAZ, Nizhny Novgorod																
GAZ-2217 Sobol	Minibus															
GAZ-3221 GAZelle	Taxi bus															
Maxus "LWB"	Minibus															
Total:																
AMO ZIL, Moscow																
ZIL-3250	Suburban bus City bus															
Total:																
PAZ, Pavlovo																
PAZ-3237	Городской															
PAZ-3203; 3204	Городской, пригородный															
PAZ-32053; 32054	Городской, пригородный															
PAZ-3206 (4x4)	Пригородный															
PAZ-4230; 4234	Пригородный, междугородный															

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
PAZ-3010 (VW based)	Taxi bus																
GolAZ-33030 (Ford)	Taxi bus																
Total:																	
Small-Series Auto Plant (ZAMS), Nizhny Novgorod																	
ZAMC-322131; 322133	Special minibuses, GAZelle-based																
Total:																	
KAVZ, Kurgan																	
KAVZ-3244	Suburban bus																
KAVZ-3976; 32081	City bus, Suburban bus																
KAVZ-4235	Suburban bus, inter-city																
KAVZ-4238	Suburban bus																
KAVZ-4239	City bus																
KAVZ-4230	Suburban bus, City bus																
KAVZ-4224 and modifications	Work-team bus																
Total:																	
Likinsky Autobus Plant (LiAZ), Likino-Dulevo																	
LiAZ-5256	City bus, Suburban bus																
LiAZ-5292; 5293	City bus																
LiAZ-6212; 6213	City bus																
LiAZ-5256-28	Tourist coach																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
GolAZ, Golitsyno, Moscow Reg.																	
GolAZ-4242; 4244	Suburban bus, inter-city																
GolAZ-3030 (Ford)	Taxi bus																
GolAZ-52911	Inter-city, Tourist coach																
GolAZ-5256-23; 5256-33; 5256-34	Inter-city, Tourist coach																
GolAZ-5251	Tourist coach																
GolAZ-Andare	Inter-city, Tourist coach																
GolAZ-6228	City bus, Suburban bus, Tourist coach																
Total:																	
Marco Russian Buses, Pavlovo																	
Real (Hyundai County)	Taxi bus																
Andare-850	Inter-city, Tourist coach																
Andare-1000	Inter-city, Tourist coach																
Total:																	
VAP Volzhanin, Volzhsky, Volgograd Reg.																	
Volzhanin-3290/901	Tourist coach																
Volzhanin-5270/701	City bus, Suburban bus																
Volzhanin-5285; 52851	City bus																
Volzhanin-52702	Tourist coach																
Volzhanin-6270	City bus																
Total:																	

Manufacturer and models	Function of the base model	Bus class	Length, mm	Fuel	GVW, kg	Year											
						2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Ford Transit	Minibus																
Volkswagen Crafter and modifications	Minibus																
Peugeot Boxer and modifications	Minibus																
Other foreign models	Minibus																
Total:																	
OTHERS																	
Total:																	
Total Russia:																	
Of them foreign models assembled in Russia																	
Belarus manufactured buses																	
Minsk Automobile Plant (MAZ)																	
MAZ-206, 226, 241	City bus, Suburban bus																
MAZ-256	Inter-city																
MAZ-103, 104, 1035	City bus, Suburban bus																
MAZ-251, 152, 231	Inter-city, Tourist coach																
MAZ-203, 2031	City bus																
MAZ-105, 107, 205, 215	City bus																
MAZ-171	Ramp bus																
Total Belarus:																	
Grand total Russia and Belarus:																	

Source: Manufacturers and Russian Federation Statistics Committee (Rosstat)

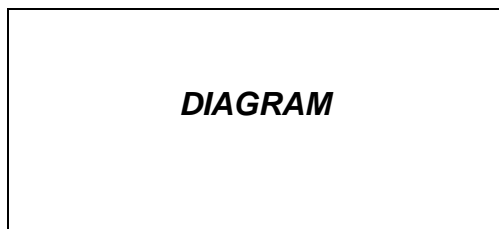
Table 6

Bus sales on the Russian market in unit terms

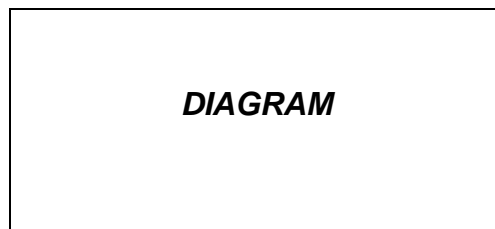
Year	Russian models		Foreign models of Russian assembly		Imported Belarusian models		Other imported models						Grand total	
	New		Used		Total									
	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%
2001														
2002														
2003														
2004														
2005														
2006														
2007														
2008														
2009														
2010														
2011														
2012														

Structure of the Russian bus market by vehicles' origin

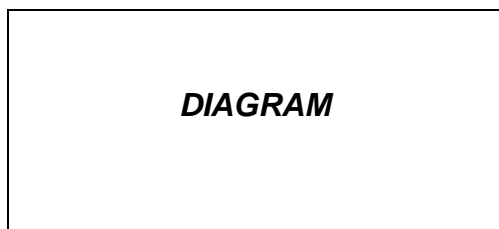
2001
Total market – XX thousand units
(100%)



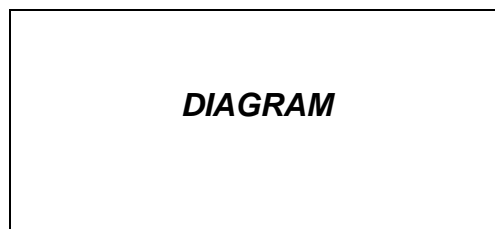
2002
Total market – XX thousand units (+XX%)
(100%)



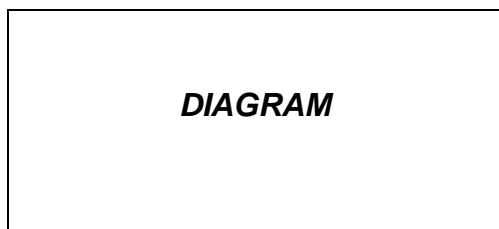
2003
Total market – XX thousand units (+XX%)
(100%)



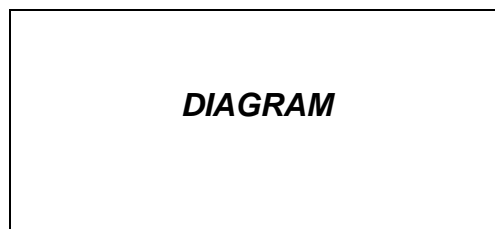
2004
Total market – XX thousand units (+XX%)
(100%)



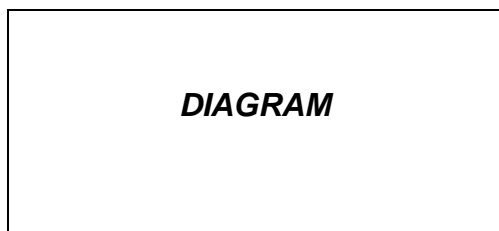
2005
Total market – XX thousand units (-XX%)
(100%)



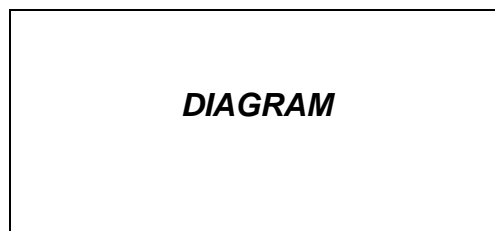
2006
Total market – XX thousand units (+XX%)
(100%)



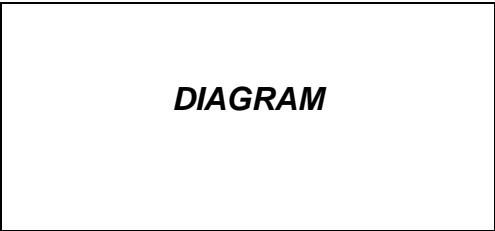
2007
Total market – XX thousand units (+XX%)
(100%)



2008
Total market – XX thousand units (-XX%)
(100%)



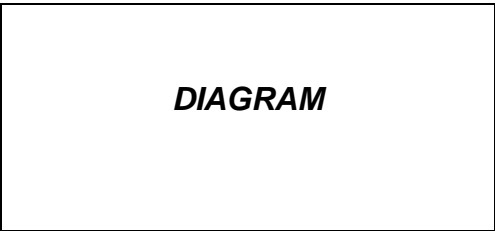
2009
Total market – XX thousand units (-XX%)
(100%)



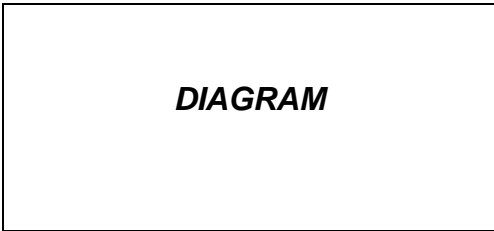
2010
Total market – XX thousand units (+XX%)
(100%)



2011
Total market – XX thousand units (+XX%)
(100%)



2012
Total market – XX thousand units (+XX%)
(100%)



Assessment of the Russian bus market structure is carried out by ASM Holding based on data from manufacturers and Federal Customs Service.

Table 7

Bus sales on the Russian market in value terms

Million Roubles

Year	Russian models	Foreign models of Russian assembly	Imported Belarusian models	Other imported models			Grand total
				New	Used	Total	
2001							
2002							
2003							
2004							
2005							
2006							
2007							
2008							
2009							
2010							
2011							
2012							

Sales in value terms are shown without VAT and customs duties.

Average exchange rate of US Dollar in 2012 was US \$1 = RUB 31.09

Source: manufacturers, Federal Customs Service, and OAR

Table 8

Dynamics of bus sales in Russia by class category, 2001-2012

thousand units

Class Origin Year	OM (Extra small)				M (Small)					S (Medium)					B (Large)					OB (Extra large)				SV (Special)		Grand total	
	RDM	RFM	IMP	TOTAL	RDM	RFM	IMPB	IMP	TOTAL	RDM	RFM	IMPB	IMP	TOTAL	RDM	RFM	IMPB	IMP	TOTAL	RDM	IMPB	IMP	TOTAL	RDM	TOTAL		
2001																											
2002																											
2003																											
2004																											
2005																											
2006																											
2007																											
2008																											
2009																											
2010																											
2011																											
2012																											

Abbreviations of bus origin:
 RDM – Russian domestic models
 RFM – Russian-made foreign models
 IMPB – imports from Belarus
 IMP – imports from other countries

Table 9

Dynamics of bus imports in Russia by class category, 2001-2012

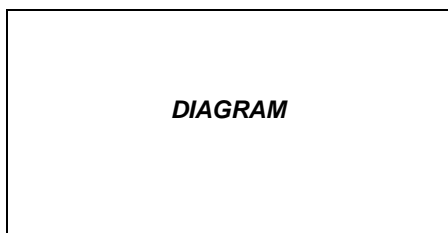
thousand units

Bus class	Origin	Year											
		2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
OM	Foreign countries												
M	Foreign countries												
	Belarus												
S	Foreign countries												
	Belarus												
B	Foreign countries												
	Belarus												
OB	Foreign countries												
	Belarus												
Total	Foreign countries												
	Belarus												
GRAND TOTAL													

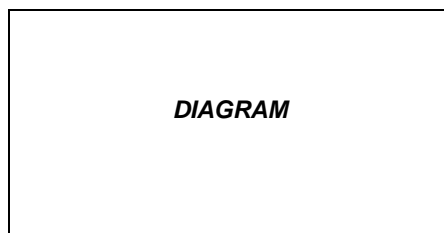
Note: "Foreign countries" = imports from any countries except Republic of Belarus

Structure of bus imports in Russia by class category

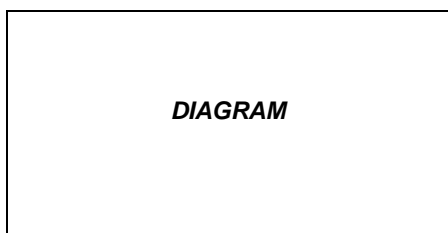
2004
Total market – XX thousand units



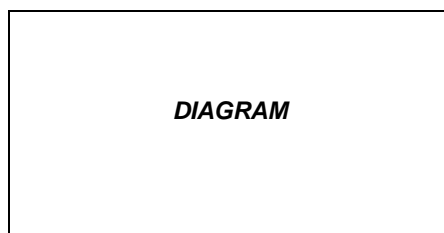
2007
Total market – XX thousand units



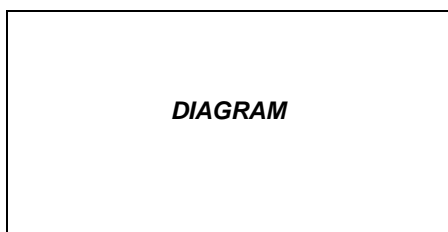
2008
Total market – XX thousand units



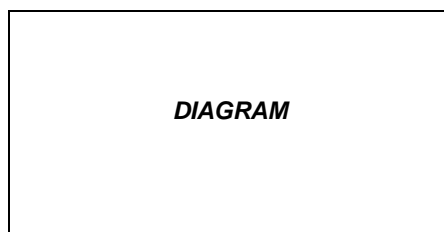
2009
Total market – XX thousand units



2010
Total market – XX thousand units



2011 год
Total market – XX thousand units



2012
Total market – XX thousand units

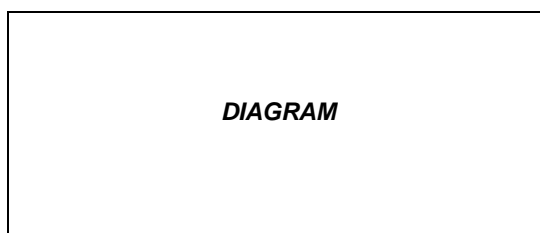


Table 10

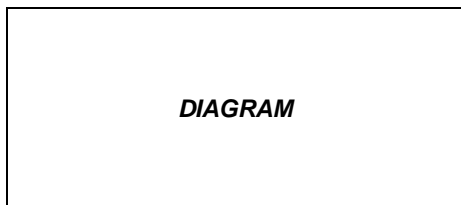
Dynamics of bus sales (for buses manufactured in Russia and Belarus) on the Russian market, by bus function

units

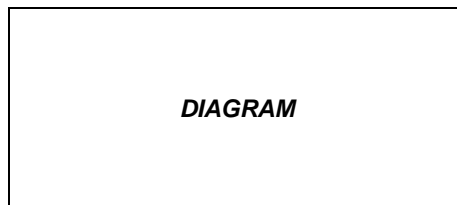
Bus type	Year																									
	2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		2012			
Russia																										
Minibuses (taxi bus, ambulance, mobile office, etc.)																										
City buses and suburban buses																										
Inter-city coaches and tourist coaches																										
Special (work team) buses																										
TOTAL:																										
Republic of Belarus																										
City and suburban buses																										
Inter-city & tourist coaches																										
TOTAL:																										
GRAND TOTAL:																										
Of which:	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%
Minibuses																										
City and suburban buses																										
Inter-city & tourist coaches																										
Special buses																										

**Structure of the market of buses manufactured in Russia and imported from Belarus,
by bus function**

2004
Total market – XX thousand units
(100%)



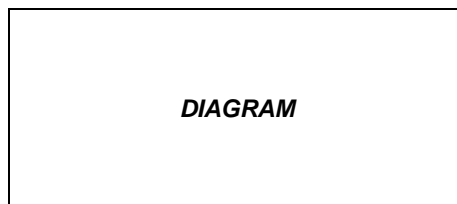
2007
Total market – XX thousand units
(100%)



2008
Total market – XX thousand units
(100%)



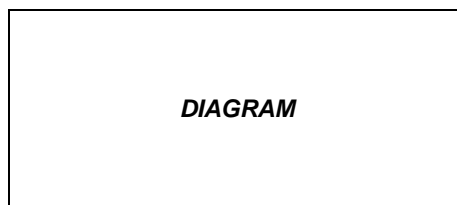
2009
Total market – XX thousand units
(100%)



2010
Total market – XX thousand units
(100%)



2011
Total market – XX thousand units
(100%)



2012
Total market – XX thousand units
(100%)

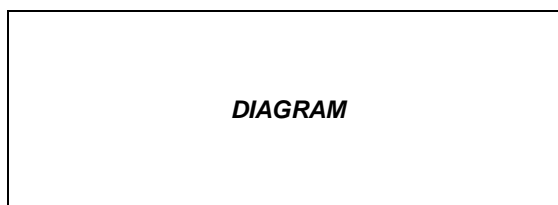


Table 11

Bus imports in Russia, 2007-2012

units

Brand	2007			2008			2009			2010			2011			2012		
	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total
Hyundai																		
Toyota																		
Kia																		
Higer																		
Bogdan																		
Daewoo																		
JAC																		
Ford																		
MAN																		
Nissan																		
Yutong																		
SsangYong																		
Iveco																		
Golden Dragon																		
Merceders-Benz																		
Volkswagen																		
King Long																		
Zhong Tong																		
BAZ																		
Setra																		
Neoplan																		
Scania																		
Cobus																		

Brand	2007			2008			2009			2010			2011			2012			
	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total	New	Used	Total	
Temsa																			
Bova																			
ShenLong																			
Volvo																			
Ikarbus																			
Chrysler																			
Hummer																			
LAZ																			
SOR																			
GMC																			
ZAZ																			
Isuzu																			
Karosa																			
Другие																			
TOTAL																			

Source: Federal Customs Service

Note: Imports from the Republic of Belarus are not included in Russian customs statistics.

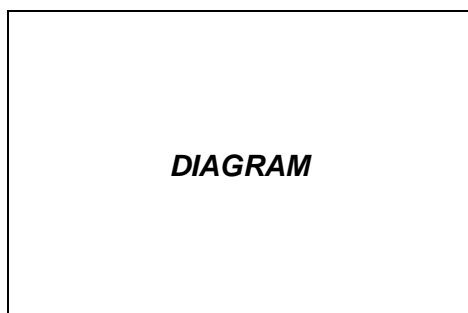
Table 12

Market shares of bus manufacturers in Russia

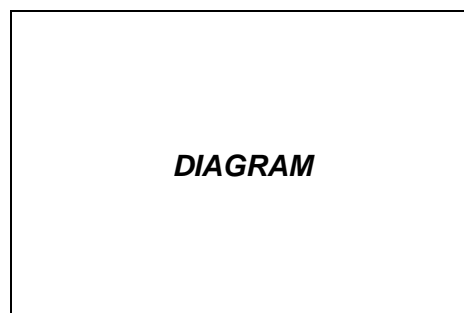
Фирмы	2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		2012			
	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%	units	%		
UAZ, Ulyanovsk																										
GAZ, Nizhny Novgorod																										
AMO ZIL, Moscow																										
PAZ, Pavlovo																										
ZAMS, Nizhny Novgorod																										
KAVZ, Kurgan																										
LiAZ, Likino-Dulevo																										
GoIAZ, Moscow Region																										
Marco Russian Buses																										
VAP Volzhanin																										
Tushino-Avto, Moscow																										
Michurinsky Autobus																										
NefAZ, Neftekamsk																										
Samotlor-NN																										
ST Nizhegorodets																										
RZGA, TAGAZ, HT Auto, Rostov Region																										
Rostov Bus Plant																										
TransAlfa Electro																										
Trolza, Engels																										
Sollers Yelabuga																										
Scania-Peter																										
AZ Ural, Miass																										
BAW Motor Corpor.																										
Kuzbass Avto, Kemerovo Region																										
PKF Luidor, Nizhny Novgorod Region																										
IRITO Group, Moscow Region																										
PROMTEKH, Nizhny Novgorod Region																										
Others																										
Total:																										
Buses from Belarus (MAZ)																										
Other imports																										
GRAND TOTAL																										

Market shares of major bus manufacturers in Russia

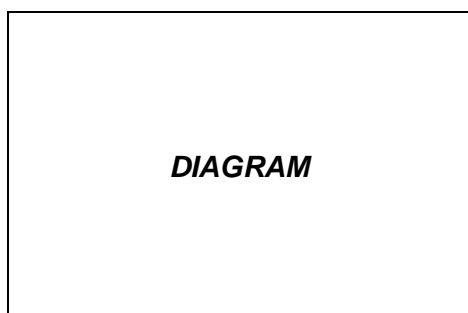
2001 год



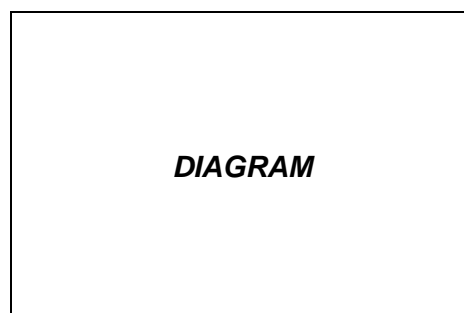
2004 год



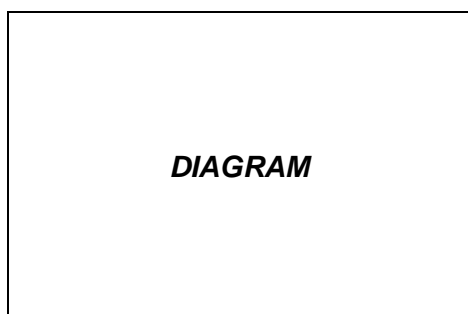
2005 год



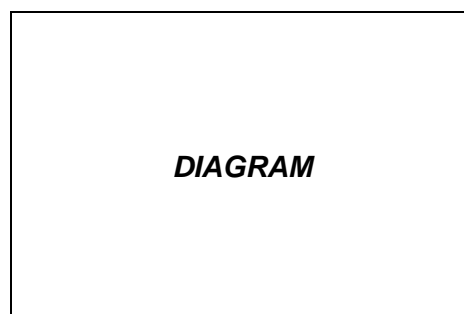
2006 год



2007 год



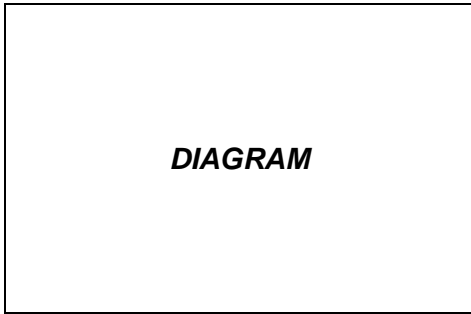
2008 год



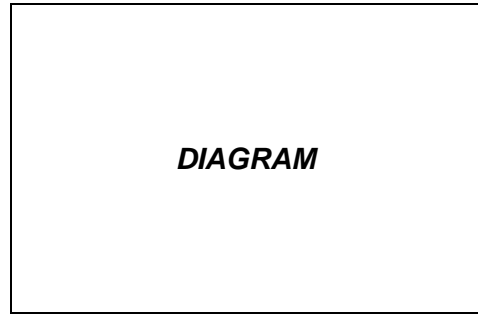
Counting imports from Belarus and other countries

Manufacturers with market shares less than 1% are included in "others".

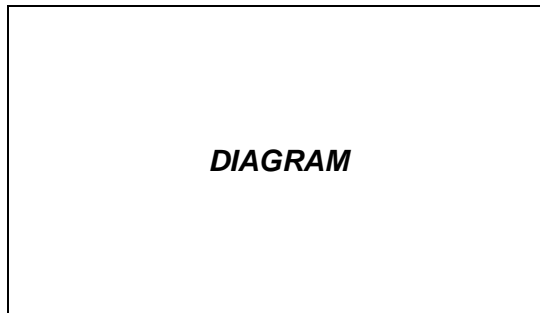
2009



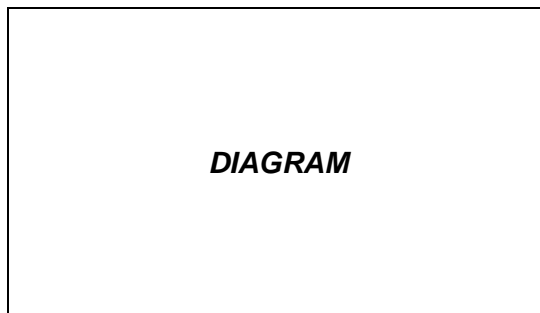
2010



2011



2012



Counting imports from Belarus and other countries
Manufacturers with market shares less than 1% are included in "others"

Table 14

Bus Parc in Russia, by federal district, 2001-2012

Federal Districts	Year											
	2001*	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
CENTRAL FEDERAL DISTRICT												
including City of Moscow												
NORTH-WEST FEDERAL DISTRICT												
including St. Petersburg												
NORTH CAUCASUS FEDERAL DISTRICT												
SOUTH FEDERAL DISTRICT												
VOLGA FEDERAL DISTRICT												
URALS FEDERAL DISTRICT												
SIBERIAN FEDERAL DISTRICT												
FAR-EAST FEDERAL DISTRICT												
Russia Ministry of Interior fleet on closed territories (location undisclosed)												
Total in the Russian Federation**												

*Distribution of the Bus Parc by federal districts in 2001 is shown here as assessed by ASM Holding experts. (Prior to 2002, the Bus Parc distribution was reported by the State Automobile Inspection for 12 economic regions in accordance with the then existing administrative structure of Russia).

** Prior to 2006, the total Bus Parc in Russia exceeded the sum of buses in use in federal districts. This is due to use of some buses in special regime zones with undisclosed location. Since 2006, such zones are counted in the parc total.

Source: State Automobile Inspection (GAI)

Table 15

Bus Parc in Russia, by class category, 2001-2012*

Year	Bus classes												TOTAL	
	Extra small (OM)		Small (M)		Medium (S)		Large (B)		Extra large (OB)		Special & work team (SV)			
	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%	thousand units	%
2001														
2002														
2003														
2004														
2005														
2006														
2007														
2008														
2009														
2010														
2011														
2012														

Source: State Automobile Inspection (GAI), NAMI State Research Centre

* Breakdown of the Bus Parc by class is carried out by ASM Holding experts.

Table 16

Rejection of buses from Russia's parc

ОКРУГА	Year																		
	2004		2005		2006		2007		2008		2009		2010		2011		2012		
	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	
Rejection total, of which by district:																			
CENTRAL FEDERAL DISTRICT																			
N.-WEST FEDERAL DISTRICT																			
SOUTH FEDERAL DISTRICT																			
NORTH CAUCASUS FEDERAL DISTRICT																			
VOLGA FEDERAL DISTRICT																			
URALS FEDERAL DISTRICT																			
SIBERIAN FEDERAL DISTRICT																			
FAR-EAST FEDERAL DISTRICT																			
Russia Ministry of Interior fleet on closed territories *																			
PARC																			

Source: RF State Automobile Inspection (GAI)

*) Since 2010, included in the total bus parc of Federal Districts

Age of Bus Parc in Russia

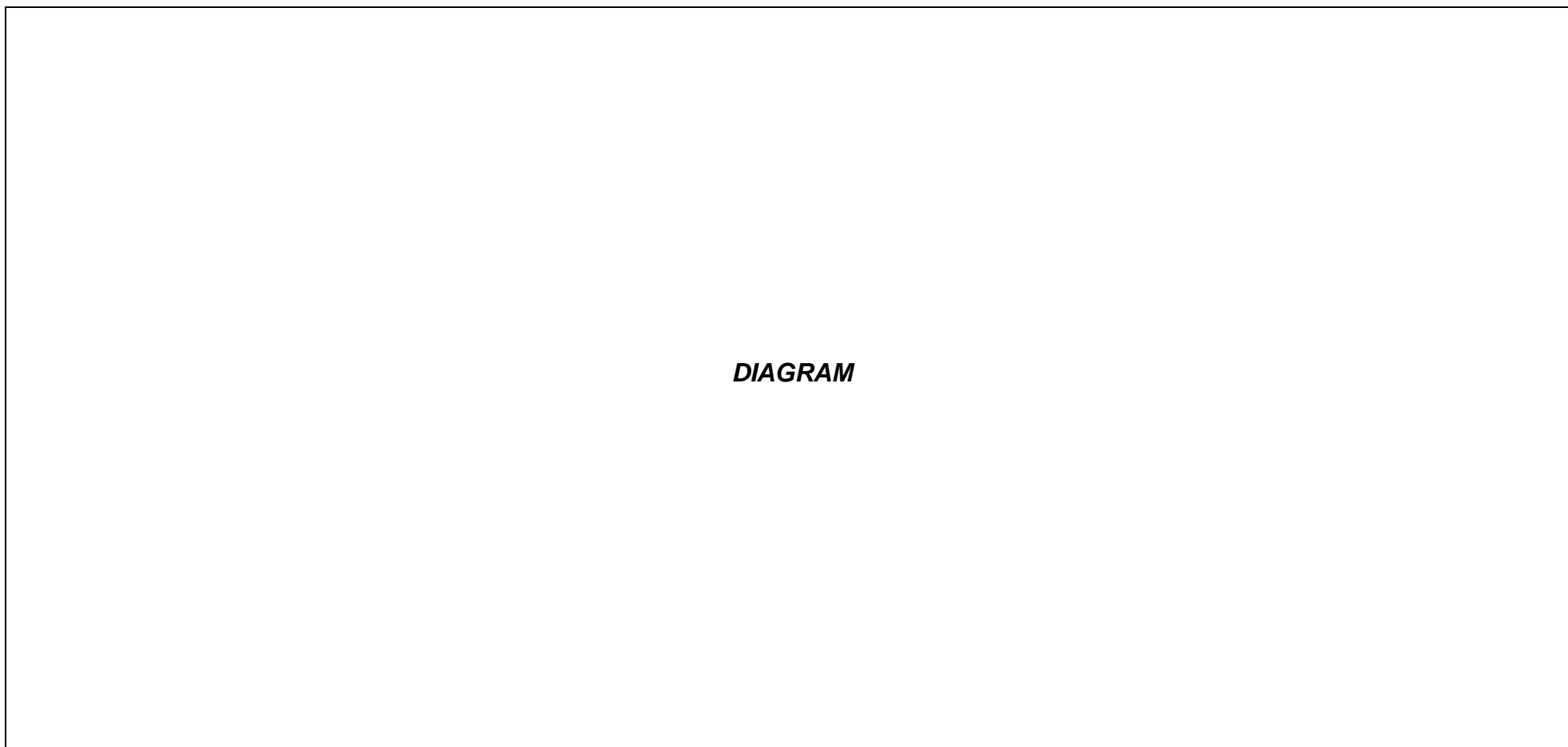
DIAGRAM

48

Vehicle age	Year																								
	2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		2012		
	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	units	share %	
up to 5 years																									
5 to 10 years																									
over 10 years																									
Parc total																									

Source: RF State Automobile Inspection (GAI)

Length of road network in Russia



49

* Local roads included since 2006 due to change of the road classification

** Motorways are considered part of national roads of common use since 2011, and they are not separately specified

Source: Russia Federal Statistics Service

Table 18

Passenger traffic by mode of public transport

million persons

	2000		2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		
		%		%		%		%		%		%		%		%		%		%		%		%	
Transport total,																									
railway																									
buses & coaches																									
taxi cabs																									
trams																									
trolley buses																									
underground																									
marine transport																									
inland waterway																									
air service																									

Table 19

Passenger turnover by mode of public transport

billion passenger-km

	2000		2001		2002		2003		2004		2005		2006		2007		2008		2009		2010		2011		
		%		%		%		%		%		%		%		%		%		%		%		%	
Транспорт - всего																									
of which by mode:																									
railway																									
buses & coaches																									
taxi cabs																									
trams																									
trolley buses																									
underground																									
marine transport																									
inland waterway																									
air service																									

Table 20

Technical specification of bus base models manufactured in Russia and Republic of Belarus

Models	UAZ-2206	UAZ-3962	GAZ-2217 Sobol	GAZ-3221-90 GAZelle	Semar-3234	ZIL-3250	KAVZ-4239 on FAW (China) chassis	KAVZ-4230-01 KAVZ-4235-01
Description								
Manufacturer								
Bus class								
Function								
Axle configuration								
Body type								
Number of doors								
Passenger capacity Total								
Number of seats								
Overall dimensions (length-width-height)								
Wheelbase, mm								
GVW, kg								
Engine model and type								
Engine location								
Engine power, HP (kW)								
Torque, Nm								
Gearbox type								
Tyres								

Models	PAZ-32053	PAZ-3203	PAZ-Real on Hyundai chassis	Volzhanin 3290	Volzhanin 5270	Volzhanin 6270	NefAZ-3299
Description							
Manufacturer							
Bus class							
Function							
Axle configuration							
Body type							
Number of doors							
Passenger capacity Total							
Number of seats							
Overall dimensions (length-width-height), mm							
Wheelbase, mm							
GVW, kg							
Engine model and type							
Engine location							
Engine power, HP (kW)							
Torque, Nm							
Gearbox type							
Tyres							

Models						
	NefAZ-5299	NefAZ-52991	NefAZ-5299-08	MARZ-42191	MARZ-4251	MARZ-5271-01
Description						
Manufacturer						
Bus class						
Function						
Axle configuration						
Body type						
Number of doors						
Passenger capacity						
Total						
Number of seats						
Overall dimensions (length-width-height), mm						
Wheelbase, mm						
GVW, kg						
Engine model and type						
Engine location						
Engine power, HP (kW)						
Torque, Nm						
Gearbox type						
Tyres						

Description	Models						
	LiAZ-5256	LiAZ-5292 Low-Floor (340 mm)	LiAZ-6212	LiAZ-6213 Low-Floor (325 mm)	GolAZ-52911 Cruise	GolAZ- Andare-850 Daewoo	GolAZ-6228
Manufacturer							
Bus class							
Function							
Axle configuration							
Body type							
Number of doors							
Passenger capacity Total							
Number of seats							
Overall dimensions (length-width-height), mm							
Wheelbase, mm							
GVW, kg							
Engine model and type							
Engine location							
Engine power, HP (kW)							
Torque, Nm							
Gearbox type							
Tyres							

Description	Models	Domestic models		Russian-assembled foreign models			
		NefAZ-4208 special	URAL-3255 special	LDV-MAXUS LWD	Volkswagen LT-28	Ford Transit Jumbo 430 TL	MB-Sprinter-413
Manufacturer							
Bus class							
Function							
Axle configuration							
Body type							
Number of doors							
Passenger capacity							
Total							
Number of seats							
Overall dimensions (length-width-height), mm							
Wheelbase, mm							
GVW, kg							
Engine model and type							
Engine location							
Engine power, HP (kW)							
Torque, Nm							
Gearbox type							
Tyres							

Description	Models	Russian-assembled foreign models			
		IVECO Daily 50C15	Hyundai County	Fiat Ducato	Scania OmniLink CL944L
Manufacturer					
Bus class					
Function					
Axle configuration					
Body type					
Number of doors					
Passenger capacity Total					
Number of seats					
Overall dimensions (length-width-height), mm					
Wheelbase, mm					
GVW, kg					
Engine model and type					
Engine location					
Engine power, HP (kW)					
Torque, Nm					
Gearbox type					
Tyres					

Description	Belarusian bus models imported in Russia					
	MAZ-206 Low-Floor	MAZ-256	MAZ-103	MAZ-151	MAZ-105	MAZ-171
Manufacturer						
Bus class						
Function						
Axle configuration						
Body type						
Number of doors						
Passenger capacity						
Total						
Number of seats						
Overall dimensions (length-width-height), mm						
Wheelbase, mm						
GVW, kg						
Engine model and type						
Engine location						
Engine power, HP (kW)						
Torque, Nm						
Gearbox type						
Tyres						

- Note: 1. Letter P before the engine model indicates petrol engine, in other cases the engines are diesels.
2. No indication of the body being installed on a truck chassis means a unibody design.
3. Automatic means automatic hydrodynamic transmission.

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Avtoselkhoz mash Holding, Open Joint-Stock Company (ASM Holding, OAO) was established in November 1991 on the basis of the former USSR Ministry of Automotive and Agricultural Machinery Industry as the first ever, in the latest history of Russia, coordinating structure of engineering industries in the economic area of the Commonwealth of Independent States. Following the market economy development, the company's functions transformed into a business line of providing wide-scale info-analytic and consultancy services to existing industrial enterprises and to new automotive market players, both domestic and foreign ones.

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