

2023 China Business Climate Survey Report
2023年度中国商务环境调查报告

**Automotive & Transportation
Vehicles Industry Report**
汽车&交通工具行业报告

This report distills industry-specific data from the full 2023 BCS Report reflects specific industry's business climate. We hope this report is helpful for our members to measure their operations and compare business outlooks and strategies with their industry and the broader foreign business community.

We want to thank all our members who took the time to participate in the survey. Your input is greatly valued and the key to our joint success.

**All data in this report was rounded to the nearest whole number. Therefore, some charts or graphs may not equal 100 percent.
 **Some response options and categories in the BCS have changed over time to address current market realities.*

- Executive Summary
- Financial Performance
- Investment Plan
- Two-Year Business Outlook
- Top three business challenges and opportunities

Automotive & Transportation Vehicles Sector Executive Summary

- In 2022, 41% of the sector members reported a break-even financial performance, 7 pp higher than the overall respondents.
- 59% of the sector members estimated that their 2022 revenue would not increase, a 9 pp lower than the overall respondents (68%)
- Nearly half of the sector members (47%) reported that China's investment environment quality was the same, while another 29% said the investment environment was deteriorating.
- 59% of the sector members said that China is not their top or first three investment destination in the near term, 4 pp higher than the overall respondents
- The sector members show more positive signs when discussing China's domestic market growth (53%) and economic recovery (53%) in the two-year business outlook. But the sector members also expressed concerns about China's regulatory environment, with 64% reporting slightly pessimistic or pessimistic views.
- Nearly one-in-fifth sector members saw expanding business to cover more of China's domestic market (e.g., entering new cities and regions) as one of their top three business opportunities in China.

本报告从2023年度BCS报告全文中摘取了汽车和交通工具行业的数据，以反映具体的行业商务环境情况。我们希望本报告能成为会员公司在其具体行业乃至更广泛的外资企业中，衡量业务、比较商业前景与策略的实用工具。

中国美国商会向所有参与此次调查问卷的会员机构致以诚挚的谢意。您的贡献是我们成功的关键。

**此报告中的所有数据四舍五入到最接近的整数，因此一些图表数值可能不等于总额（100%）*

***BCS中的一些回答选项和类别会有所变动，以顺应当下不断变化的市场现状*

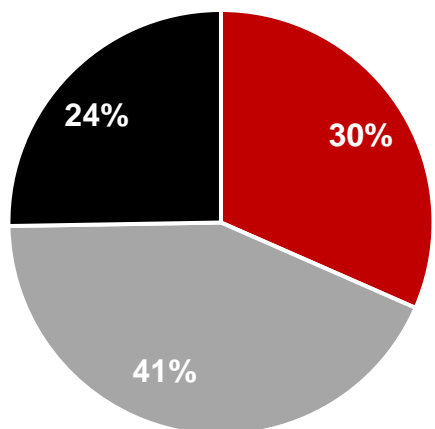
- 摘要
- 营收状况
- 在华投资计划
- 今后两年中国业务展望
- 在华运营前三大挑战和机遇

汽车 & 交通工具行业概述

- 2022年，41%的汽车行业受访会员企业报告其财务状况基本持平，比所有行业受访会员企业比例高7个百分点。
- 59%的汽车行业受访企业预计其2022年预期营收不会增加，相比于所有行业受访企业（68%）低9个百分点。
- 大约一半（47%）的汽车行业会员企业报告中国的投资环境质量保持不变，另有29%的该行业会员企业表示投资环境在恶化。
- 59%的汽车行业会员企业表示中国在短期内不再是其前三大投资目的地之一，比所有行业受访企业高4个百分点。
- 汽车行业会员对于未来两年的中国业务展望在国内市场增长（53%）和经济复苏（53%）两个方面展示出更加乐观的信号。但同时也对中国的监管环境表示担忧，其中有64%的行业受访企业对监管环境持略微悲观或悲观态度。
- 接近五分之一的行业会员企业认为“扩大业务范围以覆盖更多中国国内市场（例如进入新城市、地区）”是其在华运营的三大机遇之一。

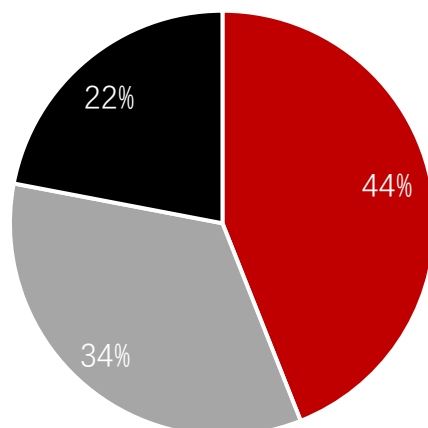
营收状况

Automotive & Transportation Vehicles Sector



■ Profitable ■ Break even ■ Loss

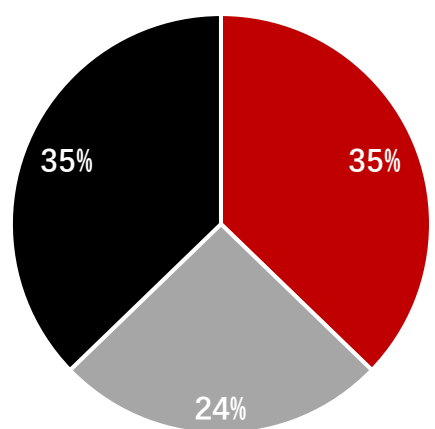
All respondents



■ Profitable ■ Break even ■ Loss

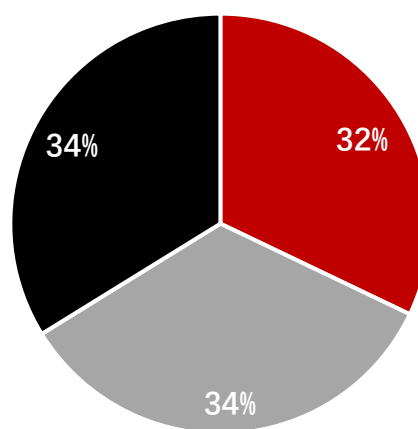
Estimated Revenue

Automotive & Transportation Vehicles Sector



■ Up ■ Comparable (± < 2%) ■ Down

All respondents

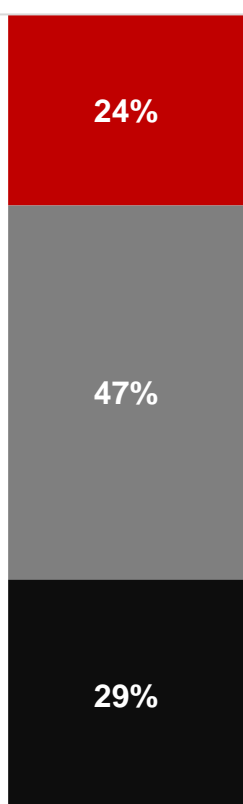


■ Up ■ Comparable (± < 2%) ■ Down

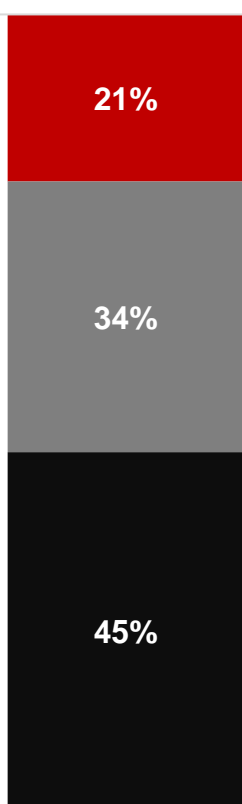
Investment Plan

China Investment environment quality

Automotive & Transportation Vehicles



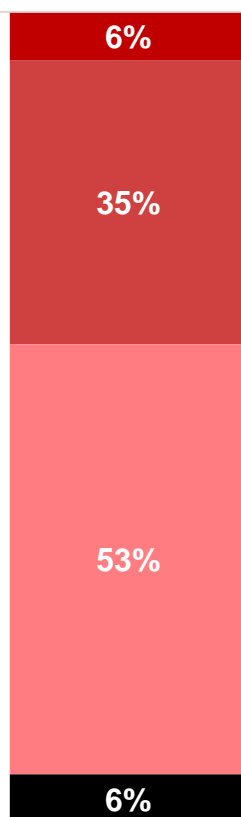
All



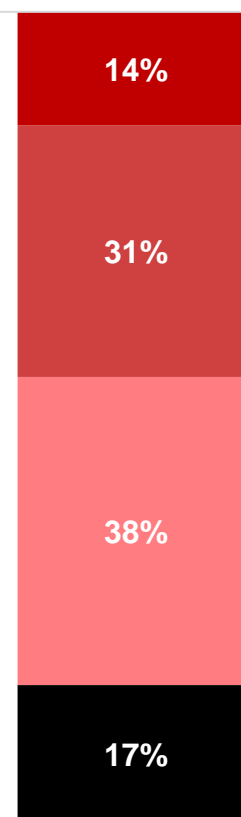
■ Improving ■ Staying the same ■ Deteriorating

China ranks of near-term global investment destination

Automotive & Transportation Vehicles



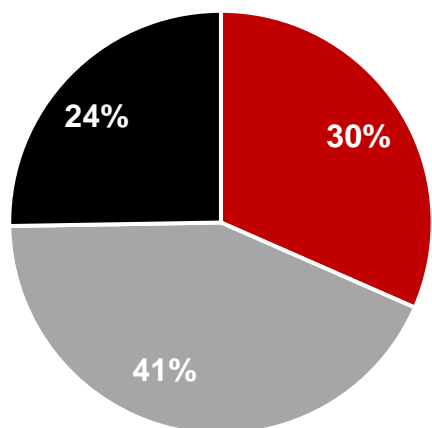
All



■ First priority ■ Top three priority
■ One among many destinations ■ Not a high priority

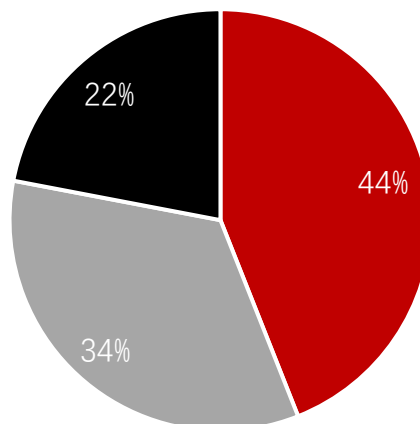
财务状况

汽车 & 交通工具行业概述



■ 盈利 ■ 基本持平 ■ 亏损

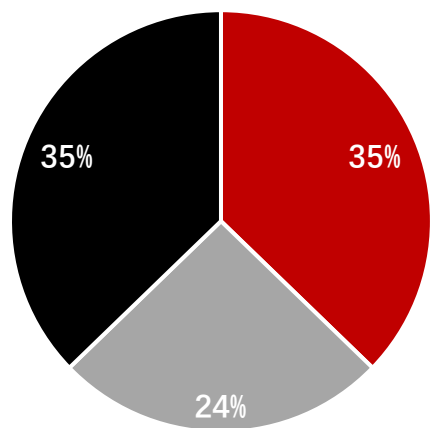
所有受访会员企业



■ 盈利 ■ 基本持平 ■ 亏损

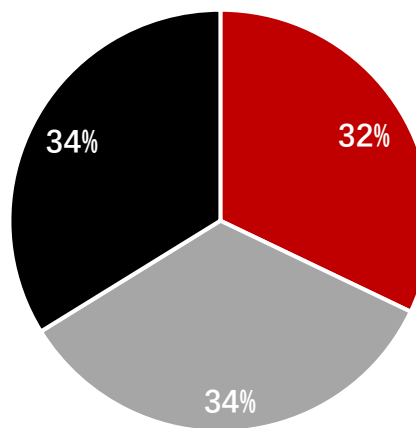
预计年度经营收入

汽车&交通工具行业



■ 上升 ■ 持平 ■ 下降

所有受访会员企业

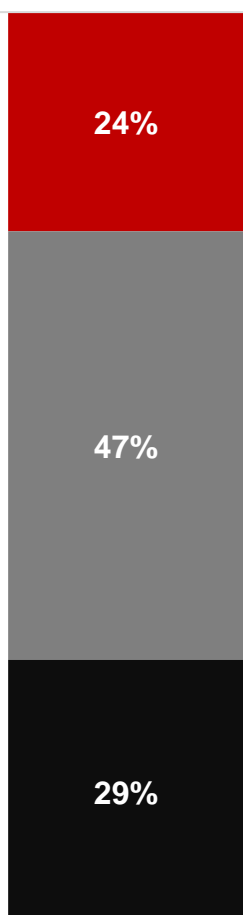


■ 上升 ■ 持平 ■ 下降

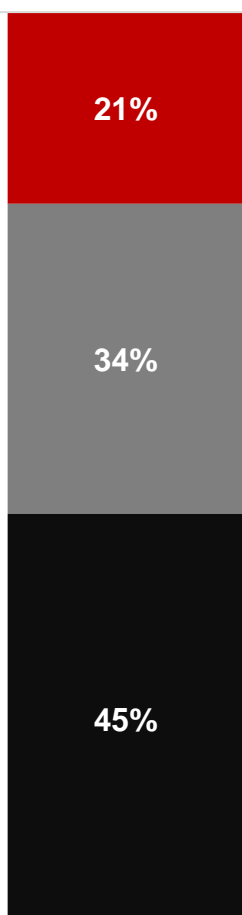
在华投资计划

中国投资环境质量

汽车&交通工具行业



所有受访会员



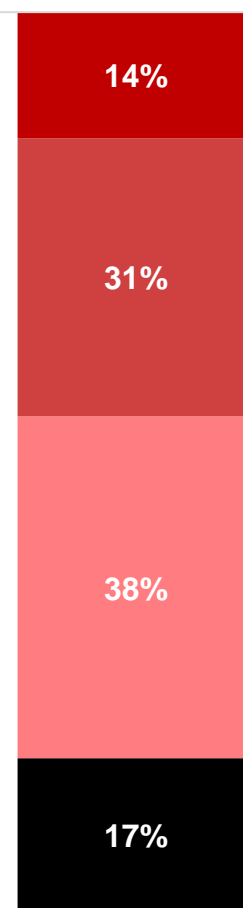
■ 有所改善 ■ 保持不变 ■ 有所恶化

中国在公司近期全球投资目的地中的排名

汽车&交通工具行业

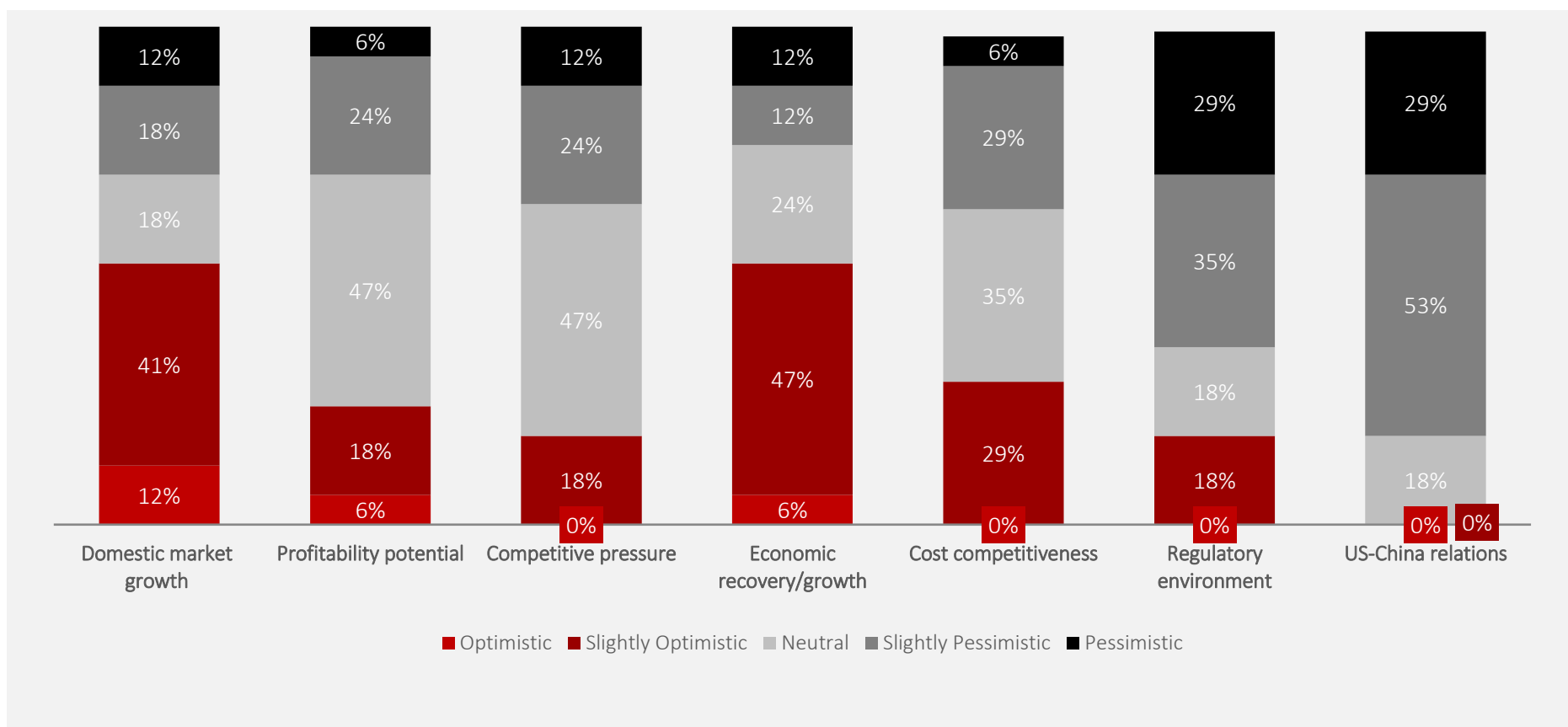


所有受访会员



■ 首要投资目的地 ■ 前三大投资目的地 ■ 众多投资目的地的之一 ■ 不是优先考虑对象

Two-Year Business Outlook in China



Top three business challenges

Automotive & Transportation Vehicles Sector	All Respondents
Rising tensions in US-China relations 65%	Rising tension in US-China relations 66%
COVID-19 prevention measures 41%	COVID-19 prevention measures 55%
Inconsistent regulatory interpretation and unclear laws & enforcement 41%	Inconsistent regulatory interpretation and unclear laws & enforcement 32%

Top three business opportunities

Automotive & Transportation Vehicles Sector	All Participants
Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 47%	Growth in domestic consumption/Rising of an increasingly sizable and affluent middle class 45%
Ongoing economic and market reform 35%	Ongoing economic and market reform 36%
Expanding business to cover more of China's domestic market (e.g., entering new cities, regions) 24%	Preferential FDI policies 23%

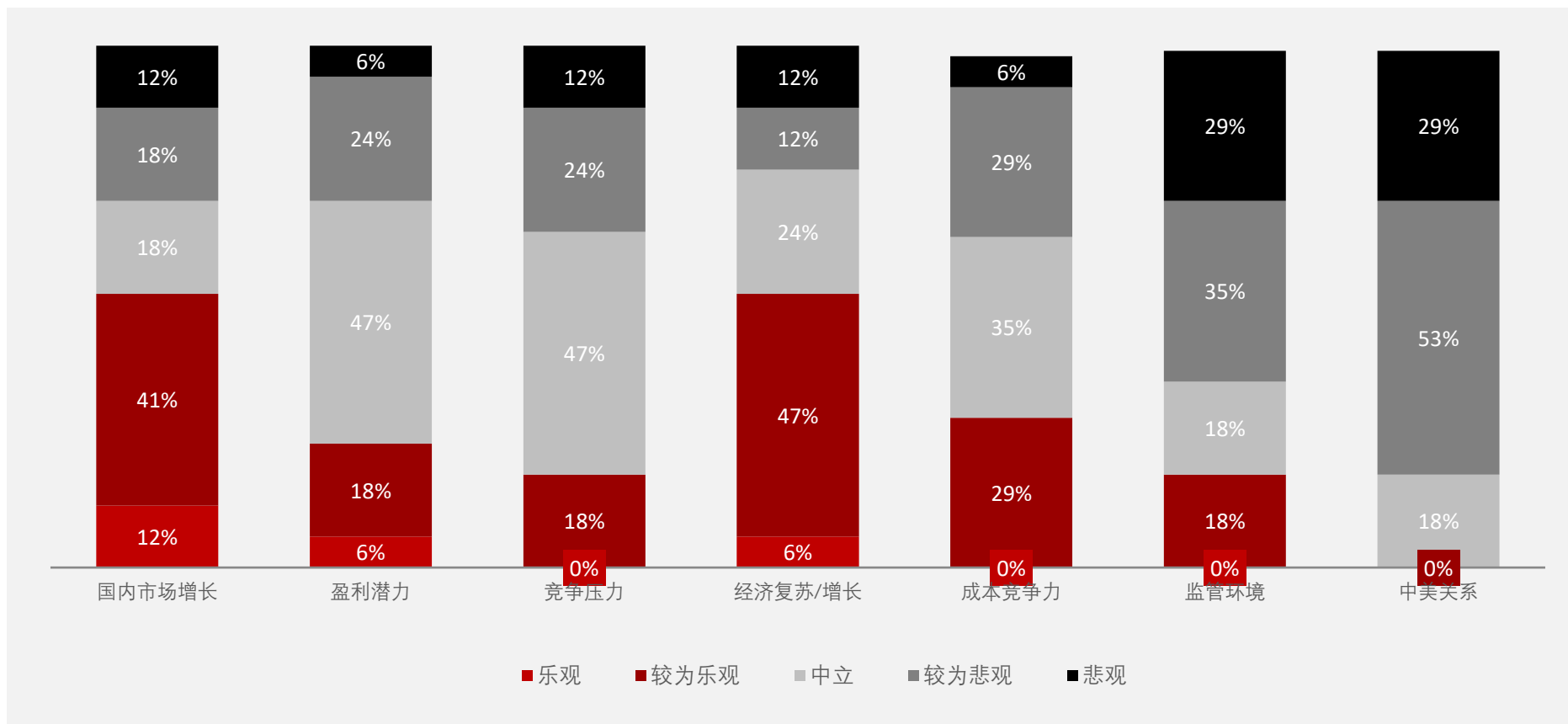


About AmCham China Business Climate Survey Report

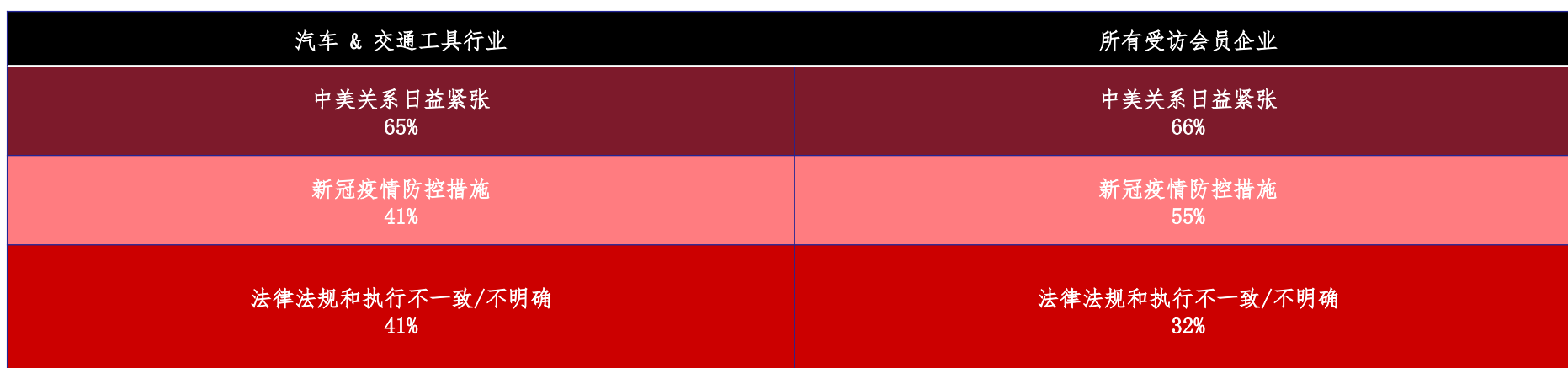
The China Business Climate Survey (BCS) is one of AmCham China’s most important advocacy tools. It provides valuable insights to the Chinese and US governments about member companies’ concerns about China’s regulatory and policy environment and the daily business challenges they face operating in China. Furthermore, the survey provides a valuable tool for our members to measure their operations and compare business outlooks and strategies with the broader community.

Visit [here](#) for more information on the report

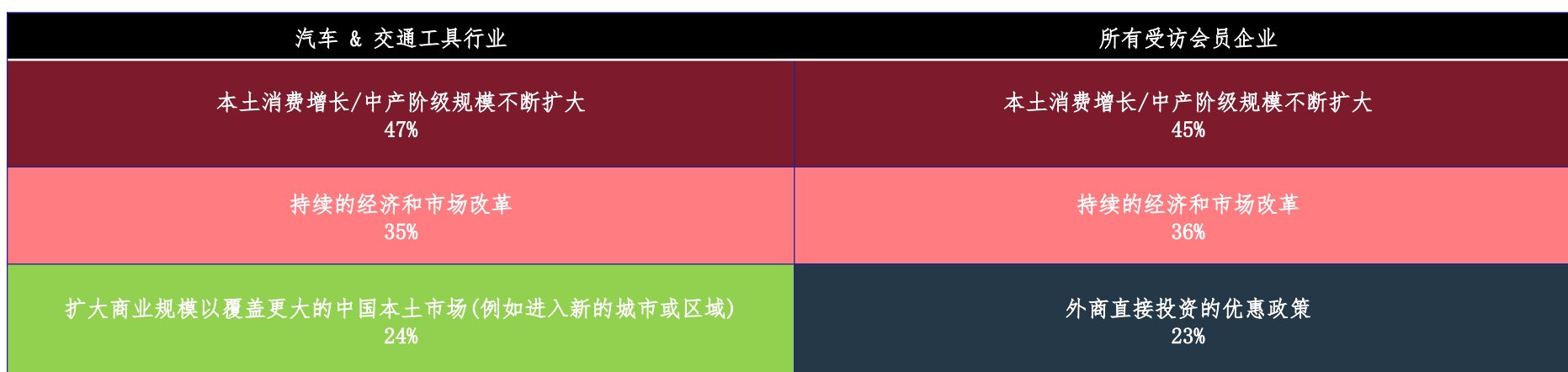
今后两年在华运营前景



前三大在华运营挑战



前三大在华运营机遇



关于中国商务环境调查报告

中国商务环境调查报告 (BCS) 是中国美国商会最重要的政策谏言工具之一。该报告结果反映了商会会员企业对中国的监管和政策环境以及在华日常运营的真实情况，为中美两国政府提供了宝贵而深入的见解。此外，报告结果也为商会会员企业以及在华外资企业运营、投资决策等方面提供了衡量依据。

更多详情，请点击[这里](#)。