

Global and China Automotive Finance Industry Report, 2013

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Abstracts

China's automotive finance market is still in the early stage of development due to consumer attitude, risk management and control, etc. While the penetration of automotive finance has exceeded 80% in the United States, India and Brazil, 60% in Japan and Western Europe, and 40% in Russia, it only achieved 15% in China in 2012, indicating huge growth potential.

As the core business of automotive finance, retail financing broke a balance of RMB 300 billion in China in 2011, of which, RMB 136.7 billion (41%) was attributable to commercial banks. Affected by the automobile purchase control policy, the retail financing balance witnessed a growth slowdown in 2012, and only increased by 13% year on year to about RMB 339 billion.

Besides the retail financing business, a mature automotive finance market shall include wholesale financing, car rental and leasing, and used car financing businesses. In 2012-2013, following the steps of Dongfeng Nissan and dealer groups, automotive finance companies, such as Mercedes-Benz Financial Services, Volkswagen Financial Services, Toyota Financial Services and BMW Financial Services, also plan to develop China's automotive rental and leasing market.

Volkswagen Finance China Co., Ltd. is a wholly owned subsidiary of Volkswagen Financial Services AG in China. In 2012, Volkswagen Finance covered more than 240 cities in China, had over 1,350 cooperative dealers, and signed 149,168 contracts, up 91% year on year. In February, 2012, Volkswagen Financial Services established Volkswagen New Mobility Services Investment Co., Ltd. in China. In January 2013, Volkswagen New Mobility Services Investment Co., Ltd. announced the successful acquisition of Shanghai Zhenlang Transportation Equipment Leasing Co., Ltd. to carry

out the automotive rental and leasing business.

Mercedes-Benz Financial is a subsidiary of Daimler Financial Services Group, and it has two business operations in China, namely, Mercedes-Benz Auto Finance Ltd. and Mercedes-Benz Leasing Co., Ltd. In 2011, Mercedes-Benz Financial covered nearly 400 cities and more than 200 dealers in China. In June 2012, Daimler Financial Services Group set up Mercedes-Benz Leasing Co., Ltd. in China to carry out rental and leasing business.

BMW Automotive Finance (China) Co., Ltd., established in 2010, is a joint venture of Germany's BMW AG (58%) and BMW Brilliance Automotive Ltd. (42%). As of August 2012, BMW Automotive Finance covered 233 of the 238 sales outlets in China, and the penetration of BMW Financial soared from the earliest 10% or so to 25%. BMW Automotive Finance mainly conducts the rental and leasing business in cooperation with automotive finance leasing companies.

Global and China Automotive Finance Industry Report, 2013-2016 of ResearchInChina analyzes the policy environment, development status, profit model, penetration and other industrial development indicators of the global and Chinese automotive finance markets, focuses on Chinese automotive finance market segments including wholesale financing, retail financing, rental and leasing, and used car financing, and sheds light on five major foreign automotive finance companies and 17 automotive finance companies in China.

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