

Automobile Leasing Industry Overview in China, 2011-2020

<https://marketpublishers.com/r/A7D6881F192EN.html>

Date: July 2016

Pages: 30

Price: US\$ 1,800.00 (Single User License)

ID: A7D6881F192EN

Abstracts

Description

Automobile industry is one of the mainstay industries in China, which is vital in national economy. The automobile industry developed rapidly after joining the WTO. The sales volume of automobiles ranked the first from 2009 to 2015 in the world, which drives the automobile leasing industry.

Automobile leasing refers to lease the automobiles (including cargo trucks and passenger vehicles) to lessees without the driving services within the agreed period. Its essence lies in gaining profits by leasing the right to use of automobiles. The leasing objects include automobiles together with all formalities and relevant value that guarantee the lessees driving formally and legally. The lessees shall be responsible for driving on their own during the lease term, which is different from general taxi business.

The competition pattern of automobile leasing industry is characterized by regional high concentration rate and scattered market share in China. For example, there are thousands of leasing enterprises in Shenzhen, but seldom large-scale ones. Presently, the overall market is highly fragmented. In terms of the category segments, short-term automobile leasing companies are the least in number but plenty in vehicles because they need large quantities of funds and network supporting; long-term auto leasing companies are the most in number but local and small in size so 80% of auto leasing companies operate in long-term business; financial automobile leasing companies mainly concentrate in the first and second tier cities in a small quantity.

Market demand of passenger vehicles can be divided into long-term leasing (over one year) and short-term leasing, which can be further divided into designated-driving and

self-driving respectively in China.

The client groups of automobile leasing market are composed of enterprise users, official users and personal users. Most enterprise users rent automobiles for a long term. The leasing companies customize renting approaches based on various client needs and provide professional and efficient service. In recent years, government departments started to rent automobiles as well, which reduced the universal malpractices such as high maintaining costs, abuse and management disorder of existing government automobiles. On Jul. 16, 2014, General Office of the CPC Central Committee and General Office of the State Council issued Guidance on Comprehensively Push Forward the Reform of Official Vehicle-Using System and The Central and State Institutions Official Vehicle-Using System Reform Program respectively, which regulated to cancel the government automobile priority of those below the vice-ministerial positions and cancel general government automobiles to grant official transport subsidy moderately instead. This indicates that the government automobile leasing enterprises have a promising market and will develop rapidly.

According to market research by CRI, the total leasing automobiles available in leasing enterprises reached 410 thousand with a market size of about CNY 45.5 billion up to the end of 2015. The CAGR was about 20% from 2011 to 2015. The concentration rate of Top 5 enterprises in automobile leasing industry was less than 20% in China in 2015, which indicated that the market was still at the stage of free competition with many opportunities for new enterprises.

According to CRI, due to the upgrade of resident consumption power and habits, short-term self-driving leisure travelling has a positive prospect.

Restricted by license plate issuing and maintaining costs in many cities, the quantity of people with driving licenses without self-owned automobiles was up to 150 million at the end of 2015. Meanwhile, the number is still increasing, which will further stimulate the potential demand for automobile leasing market in China. According to CRI, growth rate of China automobile leasing market size will be over 20% from 2016 to 2020.

Through this report, the readers can acquire the following information:

Definition and Classification of Automobile Leasing

Research Methods, Parameters and Assumptions of the Report

Competition of Automobile Leasing Industry in China

Top 5 Enterprises of Automobile Leasing Market in China

Development Opportunities and Driving Forces Faced by Automobile Leasing Industry in China

Risks and Challenges in Development of Automobile Leasing Industry in China

Analysis on Costs of Automobile Leasing Industry in China

Forecast on Development of Automobile Leasing Industry in China

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