

Automobile Maintenance Industry Overview in China, 2011-2020

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Abstracts

Description

The automobile maintenance includes maintenance and repair. Maintenance is classified into partial, integral and deep maintenance, auto beauty as well as the replacement of consumable components, which is selected by automobile owners according to the mileage. Repair is classified into breakdown and accidental repair, which is selected according to the automobile damage.

A series of policies were published in China in recent years to break the monopoly and promote the development of the industry. The monopoly of whole-vehicle manufacturers in technologies and spare part circulation systems leads to difficulties and high prices of automobile maintenance. Chinese government issued a series of policies to pave the way for the after-market automobile maintenance industry. For example, China Ministry of Communications issued Information Disclosure Management Method of Automobile Maintenance in Sept. 2015.

As one of the mainstay industries in China, the automobile industry experienced the first ten years of prime development in the 21st century. At present, the growth rate of new automobile sales volume is slump while that of the after-sales market remains high and possesses a positive prospect. The automobile reserve increased continuously with the economy and reached 184 million by Jun. 2016. The sales volume approached 24.6 million in 2015. The demand for automobile maintenance grows rapidly with the reserve, sales volume and longer average service time of automobiles in China. According to CRI, the market size of the automobile maintenance reached CNY 800 billion in 2015 with the CAGR of 14.9%, far surpassing the growth rate of the automobile industry and GDP in China.

CRI market research indicates that automobile maintenance enterprises are classified into three types including 4S, fast repair chain and traditional repair stores or factories. At present, 4S stores only provide after-sales services for authorized brands as special authorized ones of whole vehicles, which lead to scattered maintenance services and low concentration rate. Fast repair chain stores are small in number accounting for less than 1% of the total and regional without brand and scale effect spanning China. Meanwhile, traditional roadside repair shops or factories are larger in number but inferior in scale, quality and level of components and technologies than the above two types. Presently, the automobile maintenance market is at the stage of growth. It is estimated that the industry concentration rate will increase continuously.

In terms of the reserve per capita, it is estimated that over 350 million new automobiles will enter the market at the prevalence stage from 2016 to 2025, which will drive the maintenance market.

According to CRI, the average service time of automobiles exceeded five years by the first half year of 2016 and this number is increasing gradually. The development of the maintenance industry is closely related to the number of automobiles beyond warranty due to long service time, especially for those private enterprises (fast repair stores and garages). On the one hand, costs of old automobiles rise with the depreciation rate of components, unit price as well as maintenance frequency. On the other hand, the demand of owners for private maintenance enterprises will increase with automobiles beyond warranty without access to corresponding services (such as Three Guarantees) in 4S stores.

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

Definition and Classification of Automobile Maintenance

Research Methods of the Report

Analysis on Competition of Automobile Maintenance Industry in China

Analysis on Top 5 Enterprises in Automobile Maintenance Industry in China

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

Risks and Challenges in Development of Automobile Maintenance Industry in China

Costs and Prices of Automobile Maintenance Industry in China

Forecast on Development of Automobile Maintenance Industry in China

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