

Report of Chinese Automobile Distribution Industry, 2012

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Abstracts

After entered WTO in 2001, Chinese automobile industry has a rapid development. Since 2009, China has become the largest country in automobile producing and marketing globally. In 2011, the production and sales volume of Chinese automobile were separately 18.4189 million and 18.5051 million (new cars), and the growth rates were 0.84% and 2.45% respectively. The rapid increase of the production and sales volume of Chinese automobiles impels the rapid development of the automobile distribution industry.

The sales models of Chinese automobiles can be divided into franchise stores for automobiles (1S-5S), automobile supermarkets, automobile exchange fairs, automobile zones, etc. These models have their own characteristics. By the end of 2011, distributors of Chinese automobiles have surpassed 60 thousand, and about 70% of them are operated in the form of retail stores. Among them, more than 10 thousand are 4S shops, increasing by over 1000 shops annually in China, whereas many 4S shops go bankrupt because of the poor operation. China has more than 500 new automobile exchange fairs and automobile zones, over 600 second-hand automobile trading fairs, and over 700 professional automobile fitting and accessory fairs. Due to the adjustment and impetus of market competition and city planning, Chinese automobile market has the tendency of centralized trading, and construction of large-scale automobile cities and zones is being carried forward in large and medium-sized cities with a favorable development momentum.

The market concentration rate of Chinese automobile circulation industry is increasing rapidly. In 2010, the number of distributors in Top 100 enterprises reached 3,000, accounting for 5% of the industry. However, the 5% distributors totally sold 3.8167 million vehicles, accounting for 21.13% in total sales nationwide. In China, the profit of

many automobile distributors is even higher than some listed automobile manufacturers, most of which are distributors who operate the business of import of luxurious cars or the middle and high-end joint brands.

Automobile market in large cities of China is nearly in saturation, so automobile markets in small and medium-sized cities inevitably will have rapid development. For automobile distributors, it will be the key to the increase in the future automobile market. All the time, because of the emphasis on large cities and negligence on small and medium-sized markets by automobile manufacturers, sales channels in small and medium-sized markets are relatively few. The competition in small and medium-sized markets is not as fierce as that in first-tier cities. Meanwhile, land prices and rents in small and middle-sized cities are lower so the cost is lower accordingly.

In Dec.2011, Ministry of Commerce of the People's Republic of China promulgated Instructions on Promoting the Development of Automobile Circulation Industry During “the 12th Five-year Planning”. It points: improving the concentration ratio of Chinese automobile distribution industry; by the end of 2015, the proportion of top 100 enterprises in Chinese automobile retail industry will exceed 30% of gross amount in the industry; there will be 30 regional automobile circulation companies with primary business revenue over CNY 10 billion; the number of large-scale automobile circulation enterprises with primary business revenue over CNY 100 billion will be three to five. In recent years, Chinese automobile circulation industry will have shuffle and M&A (mergers & acquisitions). The weight of group automobile distributors and automobile manufactures will be heavier in negotiation. Because the coverage of automobile distribution industry also includes after-sale services and second-hand sales of automobile, etc., it can be expected that the development speed in automobile distribution industry will exceed that in automobile manufacturing industry.

More following information can be acquired through this report:

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Others

Contents

1 CURRENT SITUATION OF CHINESE AUTOMOBILE DISTRIBUTION INDUSTRY

- 1.1 Production and Marketing Status of Chinese Automobile
 - 1.1.1 Production and Marketing Status of Chinese Automobile Industry, 2009-2011
 - 1.1.2 Sales of Various Series of Automobiles in Chinese Market
- 1.2 Analysis on Chinese Automobile Distribution, 2011
 - 1.2.1 Operation of Chinese Automobile Distributors, 2011
 - 1.2.2 Market Characteristics of Automobile Distribution Industry
- 1.3 Government Policies

2 ANALYSIS ON OPERATION PATTERNS OF CHINESE AUTOMOBILE DISTRIBUTION INDUSTRY

- 2.1 Introduction and Comparison of Operation Patterns
 - 2.1.1 Franchise Store
 - 2.1.2 Chain Operation
 - 2.1.3 Fair of Automobiles (Avenue of Automobile)
 - 2.1.4 Direct Marketing (Online Marketing and Telephone Marketing)
- 2.2 Major International Distribution Patterns
 - 2.2.1 U.S.A.
 - 2.2.2 Japan
 - 2.2.3 South Korea
 - 2.2.4 European Union
- 2.3 Analysis on Distribution Patterns of Chinese Automobile Industry

3 ANALYSIS ON MAJOR CHINESE AUTOMOBILE DISTRIBUTORS

- 3.1 Top 10 Enterprises in Chinese Automobile Distribution Industry
- 3.2 Pang Da Automobile Trade Co., Ltd.
 - 3.2.1 Brief Introduction
 - 3.2.2 Sales Network
 - 3.2.3 Brand Management
 - 3.2.4 Performance
- 3.3 Wuhu Ya Xia Automobile Co., Ltd.
 - 3.3.1 Brief Introduction
 - 3.3.2 Sales Network
 - 3.3.3 Brand Management

3.3.4 Performance

3.4 Zhongsheng Group Holdings Co., Ltd.

4 PREDICTION ON DEVELOPMENT OF DISTRIBUTION PATTERN OF CHINESE AUTOMOBILE INDUSTRY, 2012-2016

4.1 Discussion on Patterns of Domestic Brand Channels

4.2 Discussion on Patterns of Joint and Imported Brand Channels

4.3 Analysis on Online Marketing

5 FUND SOLUTIONS OF CHINESE AUTOMOBILE DISTRIBUTORS

5.1 Analysis on Capital Operation of Automobile Distributors

5.2 Vehicle Manufacturers Investment to Automobile Distributors

5.2.1 Financing Loans from Auto Financing Companies to Distributors

5.2.2 Cooperation with a Third-party Bank

5.2.3 Draft and Cash

5.2.4 IPO (Initial Public Offering)

6 PREDICTION ON FUTURE TRENDS OF CHINA AUTOMOBILE DISTRIBUTION INDUSTRY

6.1 Prediction on Scale of Automobile Sales

6.2 Prediction on Development Trend of Distributors

6.3 Development Trend of Sales Model

Selected Charts

SELECTED CHARTS

Chart Sales Volume of Chinese Automobile, 2003-2011
Chart Sales Amount of Chinese Automobile, 2006-2011
Chart Sales Quota of Cars of Different Series, 2004-2010
Chart Comparison in Chinese Various Automobile Marketing Patterns
Chart Top10 Enterprises of Chinese Automobile Distribution Industry, 2010
Chart Operation of Pang Da Automobile Group Co. Ltd., 2008-2010
Chart Operation of Wuhu Ya Xia Automobile Co. Ltd., 2008-2010
Chart Top100 Distributors of Chinese Automobile, 2010
Chart Prediction on Sales Volume of Chinese Automobiles, 2012-2016

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