

Research Report on Automobile Distribution Industry, 2017-2021

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Abstracts

Description

The automobile industry develops rapidly after China joined the WTO. From 2009 to 2016, China remained the world's largest producer and seller of automobiles for 8 consecutive years.

The production and sales volume of automobiles in China was 28.119 million and 28.028 million in 2016, increasing by 14.5% and 13.7% respectively, compared to 2015. Influenced by preferential policies, the production and sales volume hit a new record high in 2016.

Besides, in 2016, the production and sales volume of passenger vehicles in China reached 24.421 million and 24.377 million, increasing by 15.5% and 14.9% respectively, which were higher than the overall growth rate. In 2016, the status of production and sales volume of 4 categories of passenger vehicles were as follows: the production and sales volume of sedan increased by 3.9% and 3.4% respectively; SUV increased by 45.7% and 44.6% respectively; MPV increased by 17.1% and 18.4% respectively; while cross passenger vehicles decreased by 38.3% and 37.8%.

In 2016, the sales volume of passenger vehicles with engines of 1.6 liter and below in China reached 17.607 million, increasing by 21.4% YOY, accounting for 72.2% of the total sales volume of passenger vehicles.

The increased production volume of automobiles stimulates the development of the automobile distribution industry.

The sales modes of automobile in China can be divided into franchised stores (1S-5S), auto supermarkets, auto trade markets and auto malls. Different modes have different features. According to CRI, at the end of 2016, the number of auto dealers in China exceeded 70,000, most of which were independent stores. Over 30,000 are 4S stores. More than 1,000 automotive 4S stores are newly established in China every year while a considerable number is closed due to poor management.

Suppose 28.028 million new vehicles were sold in China in 2016 by over 70,000 automobile dealers, the average sales volume of each dealer was only 400. It is quite low compared to the establishing cost of millions or even ten millions of RMBs. Many whole vehicle manufacturers plan to expand the number of their dealers, which will further reduce the profits of auto dealers. Currently, domestic auto dealers mainly rely on profits of new auto sales. The after-sales market remains immature.

CRI Market survey shows that there are over 2,000 new vehicle markets and automobile parks, over 1,000 used vehicle markets and ten thousands of auto component and accessory stores in China. With the development of e-commerce in China, a great number of individuals and enterprises run auto parts business by B2B and B2C modes.

The automobile market in China's first and second tier cities is saturated and therefore exhibits sluggish growth. By contrast, market in the third and fourth tier cities is developing rapidly, which will drive the future growth of auto market for automobile dealers. The neglect of medium and small cities leads to insufficient sales channels and less competition. Meanwhile, land and labor costs are relatively low in medium and small cities, which reduce the establishment cost of sales channels.

With the rapid development of e-commerce in China, concepts of e-commerce and O2O become quite prevalent in auto sales and services. Meanwhile, auto e-commerce is also developing fast. Numerous whole vehicle manufacturers and auto dealers cooperates with B2B and C2C platforms to expand online auto sales channels. In addition, due to decreasing profits of new auto sales, dealers on the Chinese market started to expand their business, such as auto finance and second-hand cars, to increase their sources of profits.

Readers Can Obtain the Following Information or More Through This Report:

Development Status of Automobile Industry in China

Economic and Policy Environment in the Development of Automobile
Distribution Industry in China

Distribution Modes of Automobiles in China

Competition Status of Automobile Distribution Industry in China

Major Automobile Dealers in China market

Development Trend of Automobile Distribution Industry in China

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