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Research Report on China Automobile Distribution Industry, 2010-2019

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Abstracts

Description

After entering WTO, China has witnessed a rapid development of its auto industry. And China has been the world's largest auto producer and seller for six years from 2009 to 2014. In 2014, auto sales reached 23.4919 million in China with a year-on-year increase of 6.9% while auto output reached 23.7229 million, increasing 7.3% year on year. Specifically, passenger car sales reached 19.7006 million in China in 2014 with a year-on-year increase of 9.9% while auto output reached 19.9198 million, increasing 10.2% year on year. The rapid growth in auto output and sales promotes the fast development of automobile distribution industry.

The sales model of car in China could be divided into automobile franchised store (1S-5S), auto mall, auto market and auto park. According to CRI's investigation, by the end of 2014, car dealers in China had exceeded 60,000 (most are individual shops), among which over 20,000 are 4S shops that report many openings and bankruptcies each year, over 1000 are new car market and parks, over 1000 second-hand car market and over 2000 auto sparepart and accessory market. Due to adjustment and promotion of market competition and city plan, car trade in Chinese market has become concentrated.

The level of concentration in auto market is rising fast. In 2014, 6.245 million vehicles were sold by the top 100 dealers in China with a year-on-year increase of 12.5%, among which 0.35 million are due to second-hand car replacement which increasingly contributes to the sales of new car. And the top 100 dealers also created 0.38 million jobs in 2014 which increased 5% year on year. In China, quite a few car dealers report a higher profit than listed car makers.

As car market in big cities has already saturated while that in small and medium-sized cities is growing fast, car dealers find it the hope for future growth. Due to car markers' high attention to big cities as well as the ignorance of small and medium-sized market, there are few distribution channels in small and medium-sized cities and the competition there is not that fierce too. Meanwhile, as the land and labor force is relatively cheap in small and medium-sized cities, the cost is low.

With the rapid development of Internet in China in recent years, such concepts as Internet and O2O exert increasingly remarkable influence on auto sales and service with new forms of marketing keeping springing up and e-business of car industry developing fast. For example, many car makers and dealers have introduced new distribution channels through cooperation with such platforms as B2C and C2C.

In Dec. 2011, the Ministry of Commerce of the People's Republic of China issued the Guidelines on Promoting the Development of Car Industry during the "Twelfth Five-year Plan Period" (2011-2015) which set the following targets to be realized by the end of 2015: (1)enhanced concentration of automobile distribution industry; (2) over 30% of the overall turnover taken up by the Top100 car retailers; (3) 30 regional car dealers with revenue of over CNY 10 billion; (4) 3-5 large-scale car dealers. As automobile distribution industry covers auto service market and second-hand car replacement, the potential clients are in a large amount, its speed of development is expected to surpass that of auto manufacturing industry.

Readers can get at least the following information through this report:

- economic and policy environment facing automobile distribution industry in China
- automobile distribution models in China
- competition in automobile distribution industry in China
- key car dealers in China
- development trend of automobile distribution industry in China

The author suggests the following groups of people purchase this report:

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car makers

enterprises engaged in auto trade

investors/research institutions interested in automobile distribution industry in China

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