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Research Report on China's Scrap Vehicle Recycling Industry, 2018-2022

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Abstracts

Description

The Chinese government provides that a vehicle should be sent to a qualified enterprise for dismantling and scrapping when it runs for 600,000 kilometers. And scrap vehicles' engines, steering gear, transmission, front and rear axles and frame are forbidden to be sold illegally and should be recycled as scrap metal. The vehicle owner can get the residual value of the recycled scrap metal. However, this provision is poorly enforced.

Vehicle consumption becomes increasingly popular in China with the development of economy and increase of income. China had ranked first in vehicle production and sales volume for nine consecutive years from 2009 to 2017. And the vehicle reserves keep rising. China's vehicle reserves reached 217 million at the end of 2017, ranking second in the world. It is estimated that China will surpass the U.S. to have the largest vehicle reserves in the world in 10 years. As the average vehicle age increases, scrap vehicle recycling has become one of the social concerns. On the assumption that the service life of passenger vehicles is between 8 to 10 years, the number of scrap vehicles had exceeded 6 million by 2017 and will grow at an annual rate over 10%. However, only 1.47 million scrap vehicles were recycled in 2017. Many scrap vehicles are still being used or were illegally disposed. For example, some of them were reassembled or refurbished to be sold as second-hand vehicles.

Owing to the poor industry regulation, legal scrap vehicle disposal has been affected by the illegal one. China's annual recycling volume only accounts for 0.5%-1% of the vehicle reserves, which is much lower than 5%-7% in developed countries. Because of the quota on the number of scrap vehicle recyclers, the numbers of registered scrap vehicle recyclers and recycling outlets were 660 and 2,465 respectively at the end of

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2016, having a wide gap with the fast-growing number of scrap vehicles. To promote the development of the industry, the Chinese government is improving relevant policies. It is expected that the new version of Regulations on Vehicle Recycling Management will cancel the quota on the number of scrap vehicle recyclers, and allow the circulation of scrap vehicles' engine, steering gear, transmission, front and rear axles and frame to qualified manufacturers for remanufacturing. This policy change will greatly expand the market of scrap vehicle recycling.

The combination with "internet+" will help legal recyclers to deal with the penetration of illegal recyclers. Moreover, e-commerce platforms will facilitate the recycler's communication with vehicle owners and downstream parts remanufacturers to increase the industry's profitability. The broad market prospect and favorable policy environment will attract a great deal of capital to the industry. In 2022, the scrap vehicle recycling volume will exceed 5 million and the market size will exceed CNY 50 billion, representing a CAGR of 28.1% from 2018 to 2022.

Topics Covered:

Development environment of China's scrap vehicle recycling industry

Volume and market size of scrap vehicle recycling in China

Competition in China's scrap vehicle recycling industry

Major scrap vehicle recycling enterprises in China

Factors influencing the development of china's scrap vehicle recycling industry

Forecast of market size of China's scrap vehicle recycling industry, 2018-2022

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Contents

1. OVERVIEW OF CHINA'S VEHICLE RECYCLING INDUSTRY

1.1 Basic Definitions
1.2 Classification
1.3 Methodology
  1.3.1 Parameters and Assumptions
  1.3.2 Data Sources

2 ANALYSIS ON CHINA'S VEHICLE RECYCLING INDUSTRY

2.1 Development Environment of China's Vehicle Recycling Industry
  2.1.1 Economic Environment
  2.1.2 Policy Environment
  2.1.3 Social Environment
2.2 Analysis on Supply of Vehicle Recycling in China
2.3 Analysis on Demand for Vehicle Recycling in China
  2.3.1 Total Recycling Volume
  2.3.2 Recycling Volume by Vehicle Type
  2.3.3 Market Size of Vehicle Recycling and Dismantling

3 ANALYSIS ON COMPETITION IN CHINA'S VEHICLE RECYCLING INDUSTRY

3.1 Barriers to Entry in China's Vehicle Recycling Industry
  3.1.1 Policy Barriers
  3.1.2 Regional Barriers
3.2 Competition Structure of China's Vehicle Recycling Industry
  3.2.1 Bargaining Power of Suppliers
  3.2.2 Bargaining Power of Downstream Enterprises
  3.2.3 Internal Competition of Vehicle Recycling Industry
  3.2.4 Potential Entrants to Vehicle Recycling Industry
  3.2.5 Substitutes for Vehicle Recycling Industry

4 ANALYSIS ON MAJOR VEHICLE RECYCLERS IN CHINA, 2017-2018

4.1 Tianjin Xinneng Renewable Resources Co., Ltd.
  4.1.1 Enterprise Profile
  4.1.2 Analysis on Vehicle Recycling Business

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4.2 Shanghai Motor Vehicle Recycle Service Center
4.2.1 Enterprise Profile
4.2.2 Analysis on Vehicle Recycling Business
4.3 Tianjin Guolian Scrap Motor Vehicle Recycling and Dismantling Co., Ltd.
4.4 Beijing Dashihe Scrap Vehicle Recycling Factory
4.5 Shenzhen Scrap Vehicle Recycling Co., Ltd.

5 ANALYSIS ON VEHICLE RECYCLING COSTS AND PRICES IN CHINA

5.1 Analysis on Costs of Vehicle Recyclers
5.1.1 Analysis on Dismantling Cost
5.1.2 Operating Cost
5.2 Analysis on Vehicle Recycling Prices

6 FORECAST ON DEVELOPMENT OF CHINA'S VEHICLE RECYCLING INDUSTRY, 2018-2022

6.1 Factors Influencing Development of China's Vehicle Recycling Industry
6.1.1 Major Driving Forces and Market Opportunities for China's Vehicle Recycling Industry
6.1.2 Threats and Challenges to China's Vehicle Recycling Industry
6.2 Forecast on Supply of Vehicle Recycling in China
6.3 Forecast on Demand for Vehicle Recycling in China

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Selected Charts

SELECTED CHARTS

Chart Vehicle Reserves in China, 2007-2017
Chart Major Policies for China's Vehicle Recycling Industry
Chart Number of Scrap Vehicle Recycling and Dismantling Enterprises in China
Chart Number of Scrap Vehicles Recycled, 2013-2017
Chart Market Size of Scrap Vehicle Recycling and Dismantling in China, 2013-2017
Chart Profile of Tianjin Xinneng Renewable Resources Co., Ltd.
Chart Profile of Shanghai Motor Vehicle Recycle Service Center
Chart Price Trend of Steel Scrap in China, 2013-2017
Chart Forecast on Number of Vehicle Recyclers in China, 2018-2022
Chart Forecast on Volume of Scrap Vehicle Recycling in China, 2018-2022
Chart Market Size of Scrap Vehicle Recycling and Dismantling in China, 2018-2022

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