



China Automotive Distribution Industry Report, 2011-2012

Oct. 2011

This report

- ◆ **Analyzes business model of auto distribution in China.**
- ◆ **Focuses development prospect of new car sales, used car sales and auto after-sales service .**
- ◆ **Highlights the operation of major auto dealers.**

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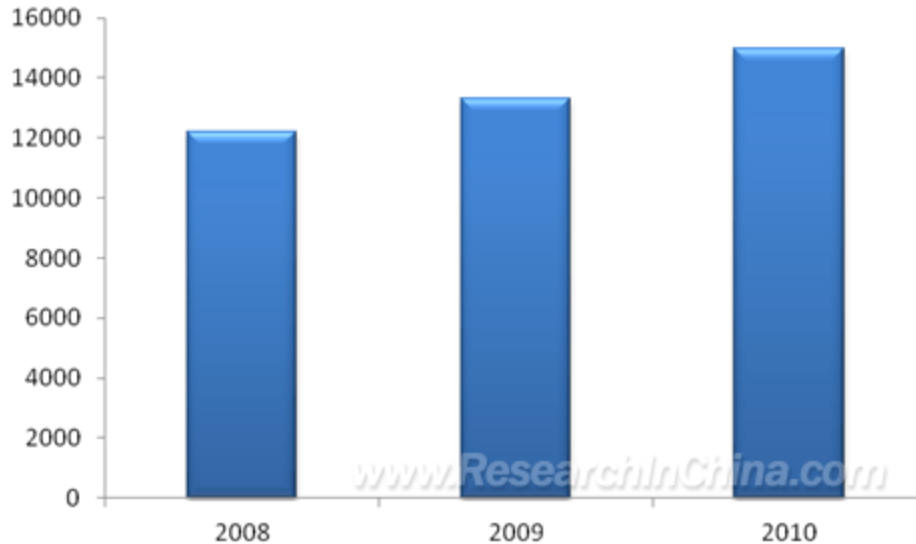
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Abstract

With the rapid growth of the automotive market, China is also accelerating the development of automotive distribution industry. According to the statistics of the Ministry of Commerce and China Automobile Dealers Association (CADA), in 2010 there were over 60,000 automotive distributors in China, including 15,000 4S stores, of which 1,700 were newly added for that year alone.

Number of Auto 4S Stores in China, 2008-2010



Source: CADA

The Report mainly covers the following aspects:

- Automotive distribution models in China and their development characteristics, strengths and weaknesses;
- Development of automotive distributors in China, including quantity, profitability, development characteristics, etc.;
- Development of various automotive distribution businesses in China, covering the distribution model, characteristics and development prospect of new cars, used cars, auto repair and maintenance, auto finance, car insurance, etc.;
- Distribution network features of six car manufacturers in China, operation of 12 listed automotive distributors, current status and expansion of 4S distribution networks.

China's automotive distribution industry has displayed two characteristics:

Automotive distributors show pretty obvious regional traits, which, however, with the distributors' continuous expansion, will gradually wear off.

China's large-scale automotive distributors are mainly concentrated in economically developed eastern, northern and southern regions, each with 1-2 large leading distributors, such as Pangda Group in Hebei, Yaxia Automobile in Anhui, and Grand Orient in Wuxi, Jiangsu. However, along with the continuous expansion of automotive distributors, the regional traits will be gradually diluted, e.g., Zhejiang Material Industrial Zhongda Yuantong Group Co., Ltd., based on Zhejiang market, has established 4S stores beyond Zhejiang since 2011, in Guiyang, Chengdu and Xi'an for instance; while ZhengTong Group, based on Hubei, Hunan and Inner Mongolia markets, has extended its distribution network to Qingdao of Shandong, Nanchang of Jiangxi, and Shenzhen of Guangdong, etc. in 2011.

Among all automotive distribution businesses in China, new car sales accounts for an overwhelming proportion, while used car and after-sales service have an enormous space for development.

For example, Pangda Group, China's largest automotive distributor, in 2008-2010 the new car sales held over 93% of the total revenue. Although the after-sales service business of Pangda Group accounted for less than 7%, its gross margin was much higher than new car sales business, and the operating revenue also experienced rapid growth at the rate of up to 42.7% and 39.9% in 2009 and 2010 respectively.

As the used car and after-sales service businesses are closely related with the new car market, we believe that after China's new car sales market reached peak growth in 2009, the auto repair and maintenance market will accelerate its growth in 2012-2013, while the supply and demand of used cars will be greatly increased in 2014-2015.



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