



**China Car Rental Industry Report,
2014-2018**

Mar. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Chinese car rental market emerged in 1990 when the Asian Games was held in Beijing. Afterwards, Beijing, Shanghai, Guangzhou and Shenzhen with higher internationalization level began to develop the market at first. Until 2000, the car rental market extended to other cities. Over more than a decade of development, China had more than 400,000 vehicles for lease by 2014 with the market size of nearly RMB40 billion, and the figures are expected to be 750,000 and over RMB60 billion by 2018.

Compared with foreign mature markets, the fast-growing car rental industry of China is featured with lower access threshold, more small-sized enterprises and lower industry concentration, meaning China's car rental industry is still in its infancy. In 2014, the penetration rate of China car rental industry was 0.5%, lower than 1.7% in the United States, 2.6% in Japan, 2.1% in South Korea and 1.5% in Brazil. At the same time, the top three car rental companies accounted for 12.6% of Chinese car rental market together, wherein CAR Inc., eHi and Avis occupied 8.1%, 2.9% and 1.6% respectively.

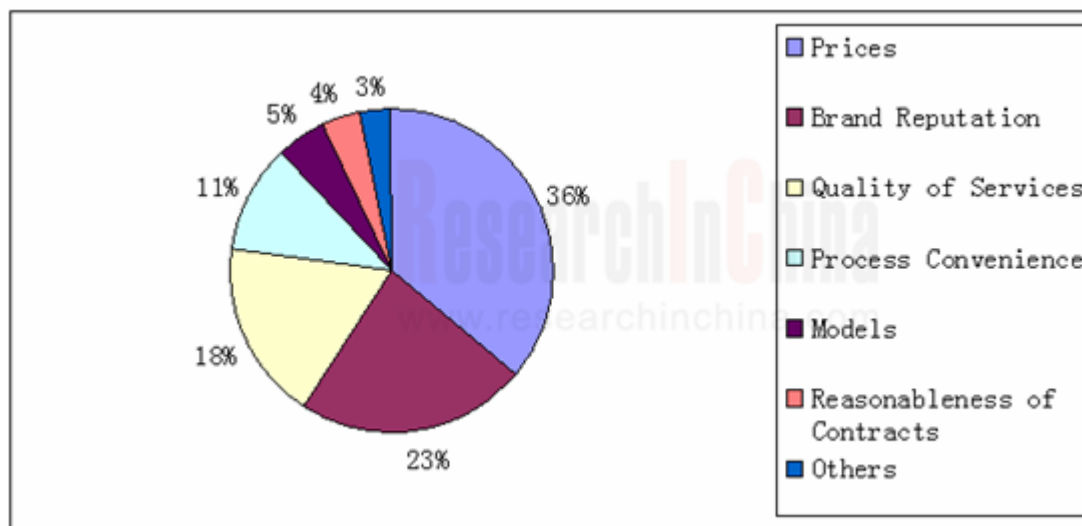
China car rental industry targeted foreign companies and large state-owned enterprises in early time, but car rental services for individuals just sprang up in recent ten years. In foreign car rental markets, about 50% of the demand comes from individuals. Chinese individual customers usually desire cars during holidays and peak seasons, and they are more concerned about prices, brand reputation, quality of services and process convenience than models.

The traditional car rental industry is involved with considerable assets and low profits; car rental companies enhance their competitiveness by expanding fleet size, improving services and operational efficiency. However, emerging platform-based Internet car rental models have exerted certain effect on the traditional business model. Relaxed policies as well as the Internet car rental and limousine services which are defined as innovative services have forced veterans such as CAR Inc. to launch their own limousine services and P2P services. Meanwhile, Didi Car, PP Car Rental and other new entrants continue to challenge the existing market competition pattern. It is foreseeable that market players will compete with each other intensely for the Internet users while consolidating their own services.

The report mainly covers the following aspects:

- Overview of China car rental industry (including definition, classification, policies, industrial development, etc.)
- Analysis on Chinese car rental market (including market size, penetration, industry concentration, competition pattern, etc.)
- Analysis on Chinese car rental market segments (including market size, competition pattern, growth momentum, etc.)
- Chinese car rental companies (including profile, equity structure, development course, the latest trends, services, business scale, operating network, brand strategies, customers, costs, core indicators, etc.)

Concerns of Consumers for Car Rental



Source: ResearchInChina

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