



China Used Car Market Report, 2015-2018

Sep. 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

Along with the increase of car ownership, China's used car market entered into a period of rapid development. In 2014, the volume and amount of used car trading in China were recorded at 6.05 million vehicles (up 16.3% year on year) and RMB367.6 billion (up 26.1% year on year), respectively. In H1 2015, the market continued to grow, with trading volume and amount rising 15.1% and 8.3%, respectively, on a year-on-year basis. Estimated at an average vehicle replacement cycle of 5-6 years, China's used car market is expected to usher in accelerated growth in the next few years, with trading volume to exceed 10 million vehicles by 2017.

By segment, China's used car market characterizes the two below:

1. Sedan becomes the subject of the market. In 2014, the volume of used sedan trading in China was 3.51 million vehicles, accounting for 58% of the total; the amount of used sedan trading came to RMB227.9 billion, representing the largest proportion (62%) of the total.
2. SUV grows at the fastest pace. In 2014, the volume of used SUV trading in China attained 200,000 vehicles, up 25% from a year ago. The growth rate will be around 38% during 2015-2018 to make SUV the fastest-growing used car market segment.

With respect to trading channels, China is intensifying the market layout of used car trading market, used car dealers, used car online trading platform, etc. Among them, used car e-commerce market has grown obviously fast, with trading volume and amount approximating 350,000 vehicles and RMB19.26 billion in 2014, a respective year-on-year surge of 58.4% and 60.3%.

According to website features, Chinese used car e-commerce can be divided into three categories: service information-oriented, represented by www.273.cn and iautos.cn; TOB auction websites e.g. www.cheyipai.com, www.youxinpai.com, www.kx.cn, pahaoche.com, etc.; TOC consignment websites e.g. souche.com www.guazi.com, renrenche.com, etc. In 2014, www.cheyipai.com and www.youxinpai.com with used car trading volume accounting for 71.4% of the entire used car e-commerce market became the largest used car e-commerce platforms in China.










Founded in 2011, www.youxinpai.com is a used car trading services platform that integrates vehicle condition assessment, bid auction, secure payment, formalities agent and logistics & transportation and earns profits from charging detection cost, 1%-3% transaction commission, transfer fee, and logistic fee, belonging to the typical B2B auction used car trading e-commercial company. In the future, www.youxinpai.com will pay attention to regional market development, used car evaluation system construction, business partner expansion as well as construction of used car information transparency.

www.cheyipai.com was founded in 2006 and the online platform was established in 2010, in the possession of four service brands i.e. Cheyipai online trading platform, 268V used car standardized testing technology, Yunyi automakers / dealers used car e-commerce solutions, and 268V Xing certification authorization service, making profits from charging detection cost (charge the seller RMB300 for successful trade), trading commissions (charge the buyer 3% commission), 2B advertising and information service fee, and logistics service fee, providing used car trading with detection, assessment, trading, training, consulting, replacement and other services, belonging to the C/B2B used car trading e-commercial company. With the improvement of Xing certification requirements, www.cheyipai.com will give top priority to raising service standards to improve the quality of used cars, classification standard and precision.

China Used Car Market Report, 2015-2018 mainly covers the followings:

- ✘ Overview of used car industry in China, involving brief introduction, development history, industry policies, etc. :
- ✘ Research on overall used car market in China, including used car trading modes and channels, market scale, market structure, market status and trends;
- ✘ Research on used car market segments in China, including trading volume by models and trading scale by regions;
- ✘ Research on used car industry chain in China, involving upstream new car market, downstream dismantling & scrapping market, and used car financial research;
- ✘ Research on used car dealers in China, covering operating conditions, used car business, recent news, etc.
- ✘ Research on used car e-commerce market in China, covering operation mode, market scale, competition pattern, and financing analysis;
- ✘ Research on used car online trading platform, including profile of platforms, business model, operation analysis.

Major Used Car E-Commerce Platforms in China and Their Operation

E-Commerce Platform	Time of Establishment	Operation Mode	Operation Analysis
 273二手车交易网	2003	Information Service	Addition of 100,000 owners and 300,000 buyers a month; more than 5,000 trading advisors
 第一车网	2004	Information Service	2,000,000 times of information browsing, evaluation for more than 10,000 used cars, and information of more than 2,000 new used cars a day
 车易拍	2006	TOB Mode	Order quantity of about 260,000 vehicles and trading volume of about 120,000 vehicles in 2014
 开新	Feb 2009	TOB Selling-Help	More than 150,000 C-terminal registered users, 11 stores; help business cooperators receive more than 1,500 used cars a month
 优信拍	Sep 2011	TOB Auction	Order quantity of 241,000 vehicles, trading volume of 130,000 vehicles, and trading amount of about RMB 7.1 billion in 2014
 大搜车 souche.com	Dec 2012	TOC Consignment	Trading volume of more than 40,000 vehicles and average trading price of RMB 140,000 in 2014. vehicle circulating availability: 49%/7 days, 69%/14 days
 平安好车 PAHAO.CN	Mar 2013	TOB Mode	Branches in 12 domestic cities e.g. Beijing and Shanghai
 人人车 renrenche.com	May 2014	TOC(P2P) Virtual Consignment	Trading volume exceeds 3,000 vehicles a month; with business covering 21 cities
 赶集好车	Dec 2014	TOC Consignment	With business blanketing 15 cities as of April 2015

Source: China Used Car Market Report, 2015-2018 compiled by ResearchInChina

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