



**China Car Sharing Industry Report,  
2016-2020**

**May 2016**

## **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

With a boom in sharing economy, car sharing companies represented by Zipcar, Uber, Getaround, and Car2go have flourished, pushing forward the development of car sharing around the world.

Fully-developed car sharing in foreign countries is primarily divided into three models: car-hailing apps, P2P car rental, and timeshare rental with the first represented by Uber, Lyft, and Ola Cabs, the middle Getaround, Turo, and Flightcar, and the latter Zipcar, Car2go, NriveNow, and Autolib.

Uber, the world's largest car-hailing app player, has so far obtained a dozen rounds of financing and now is valued at USD60 billion. The company has penetrated into a total of 447 cities in countries consisting of the United States, China, India, Singapore, Malaysia, etc.

The Chinese car sharing market is still in the phase of rapid growth but has showed huge potential. A series of laws & regulations and policies, including the Guidance on Promoting Green Consumption and the Guidance on Promoting the Development of New Energy Vehicle Timeshare Sector in Shanghai, have been introduced by the central government and local authorities so as to regulate and encourage the development of car sharing industry.

**Car-hailing apps:** A competitive landscape with DidiChuxing, YidaoYongche, Uber, ShenzhouZhuanche, 51 Yongche, Dida Pinche, and TiantianYongche as major players have taken shape in the Chinese car-hailing apps market. Orders for car-hailing services totaled about 2 billion in China in 2015, including 1.43 billion or 71.5% of the total amount from DidiChuxing, followed by Uber with a percentage of 18.3%.

DidiChuxing, a result of the merger between DidiDache and KuaidiDache, combines their own advantages. Having raised more than USD5 billion, it is the largest domestic car-hailing app platform in China valued at USD20 billion. The number of drivers connected to the platform had exceeded 14 million and registered users amounted to 250 million by the end of 2015.

**P2P car rental:** With PP Zuche rolling out its services in China, PP car rental platforms like Atzuche, UU Cars, Baojia, and KuaikuaiZuche have sprung up around China.

P2P car rental firms now rely heavily on financing for capital to expand business scope and grab customers. PP Zuche, with the largest amount of financing, got RMB500 million in financing in Sept 2015, the largest one in P2P car rental market.

## Key Timeshare Programs in China

	Operator	Timeshare Program	Established	Coverage	Auto Model	Charging Standard
<b>OEMs</b>	Kandi Electric Vehicles (a joint venture of Geely and Kandi Technologies)	Weigongjiao	2013	Hangzhou, Changsha	Kandi K10 (Mini), Kandi K11 (Panda)	at least 20 Yuan/h
	Beijing Hengyu Electric Vehicle Rental (a joint venture of BAIC BJEV and Foxconn)	GreenGo	2014	Beijing	BAIC E150EV, BAIC EV200, Chery EQ, Tesla Model S85, Tesla Model S60, BAIC Senova C70, BMW Brilliance Zinoro 1Ee, BYD E6	at least 16 Yuan/h
	Shanghai Saike Car Rental (a subsidiary of SAIC Motor)	Esharing Car	2015	Shanghai	Roewe E50, Roewe 550	0.6 Yuan/minute, 180 Yuan/d
	Chongqing Pand Car Rental (a subsidiary of Lifan Group)	Pand-Auto	2015	Chongqing, Hangzhou	Lifan 330EV, Lifan 630EV	19 Yuan/h
<b>Third-party company</b>	Hangzhou Chelizi Intelligent Technology	Chefenxiang	2011	Hangzhou, Beijing, Ningbo, Qingdao, Changzhou	BAIC E150, BAIC E200, BMW Brilliance Zinoro, Chery EQ	at least 16 Yuan/h
	Yiweixing (Beijing) Technology	Feezu	2013	26 provinces and municipalities nationwide	--	--
	Shanghai International Automobile City New Energy Vehicle Operation Service Co., Ltd.	EVCARD	2013	Shanghai	Roewe E50, Chery EQ, BMW Brilliance Zinoro	15 Yuan in first 30 minutes, 0.5 Yuan/minute after 30 minutes, max. 180 Yuan per 24 hours
	Eka Green (Beijing) Car Rental	EkaZuche	2013	Beijing	BAIC E150EV	59 Yuan/2h, 99 Yuan/4h, 159 Yuan/d
	Beijing Dingding EV Car Rental	EVrental	2013	Beijing, Shenzhen, Sanya, Tangshan	--	At least 9 Yuan/h
	Beijing YIZU Technology	YiyiZuche	2014	Beijing, Wuzhen	BYD E6, BAIC EV200, ZotyeZhidou, Tesla	--
	Jiaoyin Brother (Beijing) Information Technology	WK Zuche	2014	20 major cities including Beijing, Guangzhou, Shenzhen, Chengdu, and Hangzhou	--	--
	Soda (Beijing) Traffic Network Technology	Soda	2015	Beijing, Chengdu, Guangzhou	Venucia e30 electric car	0.19 Yuan/minute+1.99 Yuan/km, 269 Yuan/d

Source: ResearchInChina

**Timeshare:** With growing heat-up of new-energy vehicle timeshare, localities have been active in developing new energy vehicle timeshare rental sector. And, new energy vehicle timeshare programs are being carried out in dozens of cities including Beijing, Shanghai, Hangzhou, and Shenzhen.

Propelled by favorable policies, carmakers, telematics enterprises, and Internet firms have flooded into the field. In addition, P2P car rental company- UU Cars announced in Oct 2015 that it would transform to timeshare model, plan to put 1,000 vehicles into operation by the end of 2015 and raise the figure to more than 6,000 units in the first half of 2016.

Major timeshare rental companies include Feezu, YiyiZuche, EVCard, WK Zuche, Soda, and EkaZuche. In addition, BAIC BJEV have launched GreenGo timeshare program, SAIC Motor E-sharing car, GeelyWeigongjiao, LifanPand-Auto, and Shou Qi Group Gofun.

The Chinese car sharing market will still be complementarily composed of car-hailing app firms, P2P car rental companies, and timeshare enterprises in the future.

Car-hailing apps market will be dominated by comprehensive mobile platforms represented by DidiChuxing and Uber; P2P car rental market will be further regulated with only two to three players surviving fierce competition; blossoming timeshare market will grow more mature under the joint efforts of market participants.

China Car Sharing Industry Report, 2016-2020 highlights the followings:

- Global car sharing industry (development course, status quo, market segments (status quo, competitive landscape));
- China's car sharing industry (status quo of development, competitive landscape, and development trends of market segments (car-hailing apps, P2P car rental, timeshare));
- 11 global and 24 domestic car sharing-related companies (profile, financing, and developments).

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